Liberty4 Consignment User Guide

Version 4.0a

Copyright 2012

Resaleworld.com, Inc.

8034 Sunport Drive Suite 404

Orlando, FL 32809

(800) 785-4800

Web: http://www.resaleworld.com/

WELCOME & THANK YOU!

Welcome to Liberty4 Consignment, the world's most advanced software designed exclusively for consignment and resale stores!

As the latest in a line of software dating back over 20 years, Liberty4 Consignment continues to represent Resaleworld's philosophy that software products should be inexpensive as well as powerful. Liberty4 Consignment is truly state of the art software, yet remains both user friendly and supremely flexible.

Combine Resaleworld's philosophy with Liberty4 Consignment's many new features, commands, and functions and you will see that Liberty4 Consignment is an indispensable tool for consignment and resale operations. There is no doubt that the level of sophistication found in Liberty4 Consignment is a requirement for any serious consignment store owner in today's competitive market.

Rest assured that our involvement with you does not stop once you purchase Liberty4 Consignment. Resaleworld offers technical support to help you install the software and solve problems if they arise. Training programs are available to help you utilize the program to its fullest potential. Price tags, labels, computer checks and other supplies are available at very competitive prices from Resaleworld, as are computer peripherals such as price tag printers and Point of Sale equipment.

As you use Liberty4 Consignment you will probably have ideas on how we may improve it. We consider your ideas and suggestions on our product and services crucial to the future development of Liberty4 Consignment. Please contact us at any time - we love feedback!

To conclude, we at Resaleworld are pleased to have the opportunity to provide you with an exceptional software program, and thank you for your patronage. We look forward to working with you in the future!

Sincerely,

The Resaleworld Team

Copyright 2010, Resaleworld.com, Inc.

CONTACTING RESALEWORLD

If you have a technical question which you cannot answer with the tools provided, please contact our technical support staff. All of our technical support professionals are eager to answer your questions and help you utilize the Liberty software most efficiently.

Address	8034 Sunport Drive Suite 404 Orlando, FL 32809	
Main Phone	407.297.9448 407.297.0640 Fax	
Sales	800.785.4800	(Software, computers and computer peripherals such as Bar Code Readers, PoS equipment, Thermal Price Tag Printers, etc.)
Supplies	800.785.4800	(Price Tags, Checks, Tag Guns & Fasteners, etc.)
Technical Support by Phone	800.785.4800	Available Monday - Friday 9:00 a.m. - 5:30 p.m. Eastern 8:00 a.m. - 4:30 p.m. Central 6:00 a.m. - 3:30 p.m. Pacific
Emergency Weekend Support	888.229.0096	Available Saturday 10:00 a.m. - 2:00 p.m. Eastern Click here for rules regarding Emergency Support.
Technical Support Online	http://forums.resaleworld.com/	
General Information	Call Sales or check our web site at http://www.resaleworld.com	

Related Topics

Send Us Your Feedback

Obtaining Technical Support from Resaleworld

Obtaining Emergency Weekend Support from Resaleworld

Copyright 2010, Resaleworld.com, Inc.

Ordering Price Tags from Resaleworld

Ordering Computer Equipment from Resaleworld

Ordering Computer Checks from Resaleworld

Ordering Supplies from Resaleworld

EMERGENCY SUPPORT

Emergency Support is available on Saturdays between 10 a.m. and 2 p.m. (EST). An "Emergency" is defined as the following:

- You are seeing errors that are preventing you opening the Liberty application
- You are seeing errors that are preventing you from adding items
- You are seeing errors that are preventing you from ringing up sales
- You are seeing errors that are preventing you from synchronizing items with eBay

This emergency line is intended to provide a channel of communication to our customers that are in dire need of support. While we will provide support to all of our customers during normal business hours (M-F, 9:30 a.m. - 5:30 p.m. EST), we must restrict the use of this line to true emergencies.

Issues with printers/bar code scanners, "how to" questions, ordering supplies, etc. will be reserved for calls during normal business hours.

To contact Technical Support on Saturdays, call the Resaleworld Support line at (888) 229-0096. During the Emergency Support hours you will be prompted to connect to Emergency Support.

Copyright 2010, Resaleworld.com, Inc.

IMPORTANT BACKUP INFORMATION - PLEASE READ!

WARNING: USE ONLY THE BACKUP ROUTINE CONTAINED IN LIBERTY TO BACKUP YOUR FILES.

Do not use any other backup procedure, software, routine, etc. unless or until you are fully competent in the methods required to successfully backup Liberty.

The reason for this warning is that Liberty uses a database format known as **SQL**. SQL requires special procedures be followed in order to backup the database.

Failure to follow these special procedures will cause your backup to fail.

Since it is not a question of if, but of when, your files will have to be restored from backup (due to a computer failure, theft, fire, etc.), NOT HAVING A WORKING BACKUP MEANS YOU WILL LOSE ALL OF YOUR DATA.

Related Topics

Backup Overview

What Causes the Need to Backup?

Using Third Party Backup Software

Copyright 2010, Resaleworld.com, Inc.

Getting Started

Copyright 2010, Resaleworld.com, Inc.

INSTALL LIBERTY

(Editor's Note: for simplicity both Liberty for Consignment (aka L4C) and Liberty for Trading Assistants (L4TA) are referred to simply as **Liberty** in their respective manuals and online help files. Liberty for Consignment is designed for selling items in the store only: it does not contain the necessary functions to list and sell items online. To sell items online, please contact Resale-world to purchase Liberty for Trading Assistants.)

In order to install Liberty under Windows 2000, 2003, or XP Pro you must be logged in as **Administrator**. If you are installing Liberty under Windows 98SE is does not matter how you are logged in.

To Check if you are Logged On as Administrator

1. Select **Start** → **Shut Down**. The Shut Down Windows dialog will display.
2. Click on the drop-down pick list under **What do you want the computer to do?** Look for the choice that says **Log off {user name}**. The user name must be **Administrator**.
    a. If the user name is **Administrator**, select **Cancel**.
    b. If the user name is not Administrator, select **Log Off** {user name} and click **OK**. Then **Log On as Administrator**. You will have to know the **password** for Administrator in order to do so.

To Install Liberty

1. If installing under Windows 2000, 2003, or XP Pro **make sure you are logged on as Administrator**.
2. **Close all programs** currently running on your computer.
3. **Insert the Liberty CD** in the CD Drive.
4. **Wait 30-60 seconds** for the CD to autorun. The Liberty Slide Show will display.
5. Click on the **Skip Slide Show and Go Directly to Install** button (in bottom left corner of screen).
6. Click on the **Liberty Logo** to install.

Copyright 2010, Resaleworld.com, Inc.

7. Go **get a cup of coffee** - the install will usually take 3-5 and sometimes as many as 20 minutes, depending on your computer.
8. When the installation is finished you will be asked if you wish to reboot the computer. Leave the CD in the computer. Choose **Yes**.
9. After you reboot, you may see a lot of numbers flash on screen. Do not interfere with this process - this is normal. Allow it to complete - it should only take a couple of minutes.
10. If you are installing under Windows 98SE you will need to complete one final step after your computer reboots. Simply follow the on screen instructions.
11. The **Set up Wizard** will run automatically at this point. Use the Set up Wizard to enter basic information into the program such as Store Name and address, price codes, various default settings, etc. You may remove the CD at this time.
12. Once Liberty is installed it is necessary to enter the serial numbers. Serial numbers are provided by Resaleworld and will be found with your CD.

Tip: *Use Liberty in Training Mode when first using and learning the software. To switch from Real Mode to Training Mode, select* ***File*** *from the Main Menu at the top of the screen, then select* ***Training Mode****. For more information please see the section entitled Training Mode, which is located in the Tutorial.*

Related Topics

Serial Numbers

Updating Liberty to a New Version

Network Set up Instructions

STARTING THE LIBERTY PROGRAMS

Start → *Programs* → *Liberty*

To Start the Liberty Inventory Module

1. First, do either of the following:
    a. Select **Start** → **Programs** → **Liberty4 Consignment** → **Liberty4 Consignment**, or
    b. Double-click on the **Liberty4 Consignment** icon on your desktop.
2. The **Software License** dialog will display. You must click on the **<Accept>** button to proceed.
3. If Serial Numbers have been entered, skip this step and go to step 4. If serial numbers have not been entered, the **Serial Number** dialog will display. Click on the **<Continue without Serial Numbers>** button to proceed.

> ***Note:*** *Liberty limits users to a maximum of 20 client accounts when serial numbers have not been entered. For information on entering Serial Numbers, please see the section entitled Serial Numbers.*

4. The **User Login** dialog will display. Enter **RWD** in both the **User Name** and **Password** fields, then select **OK**.

> ***Tip:*** *Use Liberty in Training Mode when first using and learning the software. To switch from Real Mode to Training Mode, select* ***File*** *from the Main Menu at the top of the screen, then select* ***Training Mode****. For more information please see the section entitled Training Mode, which is located in the Tutorial.*

To Start the Liberty Point of Sale Module

1. Do either of the following:
    a. Select **Start** → **Programs** → **Liberty4 Consignment** → **Liberty PoS**, or
    b. Double-click on the **Point of Sale** icon on your desktop.
2. The **User Login** dialog will display. Enter **RWD** in both the **User Name** and **Password** fields, then select **OK**.

> ***Tip:*** *Use Liberty in Training Mode when first using and learning the software. To switch from Real Mode to Training Mode, select* ***File*** *from the Main Menu at the top of the screen, then select* ***Training Mode****. For more information please see the section entitled Training Mode, which is located in the Tutorial.*

Copyright 2010, Resaleworld.com, Inc.

To Start the Liberty Reports Module

1. Do either of the following:
    a. Select **Start** → **Programs** → **Liberty4 Consignment** → **Liberty Reports Module**, or
    b. From the main menu, select **Reports**, then **Reports** again.
2. The **User Login** dialog will display. Enter **RWD** in both the **User Name** and **Password** fields, then select **OK**.

> ***Tip:*** *Use Liberty in Training Mode when first using and learning the software. To switch from Real Mode to Training Mode, select* ***File*** *from the Main Menu at the top of the screen, then select* ***Training Mode****. For more information please see the section entitled Training Mode, which is located in the Tutorial.*

To Start the Liberty Order Manager Module (For Selling Online Only)

1. Do any one of the following:
    a. Start **Liberty4 Consignment**, then click on the **Order Manager** icon located at the top of the screen, or
    b. Select **Start** → **Programs** → **Liberty4 Consignment** → **Liberty Order Manager**, or
    c. Double-click on the **Liberty Order Manager** on the desktop.

Related Topics

Training Mode

Password and User Name for Logging on the First Time

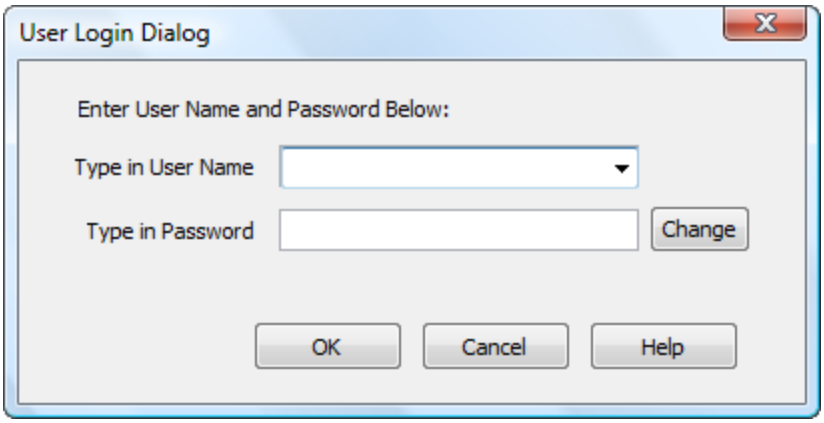
Set Up Employee Access to Liberty

Set Up Security Levels for Employee Access to Liberty

Copyright 2010, Resaleworld.com, Inc.

Password and User Name for Logging on the First Time

When you start Liberty4 Trading Assistants or Liberty Point of Sale a **User Login** dialog (or *window*) will display:



The Set up Wizard allows you to enter a user name and password of your choice. You may also use the default user name and password provided with Liberty, which are both **RWD**.

> ***Note: The initial Login and initial Password are both RWD.***

To make changes to the user login names and passwords, please see the sections entitled *Set Up Employee Access to Liberty* and *Set Up Security Levels for Employee Access to Liberty*.

Related Topics

Set Up Employee Access to Liberty

Set Up Security Levels for Employee Access to Liberty

Copyright 2010, Resaleworld.com, Inc.

SERIAL NUMBERS

Inventory Module → Help → Enter Serial Number

Liberty is protected against unauthorized use, duplication by the Software License Agreement, United States Copyright Law, and by the issuance of a Serial Number that is unique to each system.

In the absence of a correct serial number Liberty the following will occur:

- Liberty will not allow any more accounts to be added. The maximum number of accounts allowed in Liberty without the correct serial number is 20: up to 50 auctions may be launched without a serial number.
- You will not be able to run Liberty over a network.

To Enter Serial Numbers

1. Make sure you are operating Liberty in **Real Mode** and not in **Training Mode**. If you are in Training Mode, the words Training Mode will **blink** at the bottom of the screen in black print on a yellow background.

   To Switch From Training Mode To Real Mode:

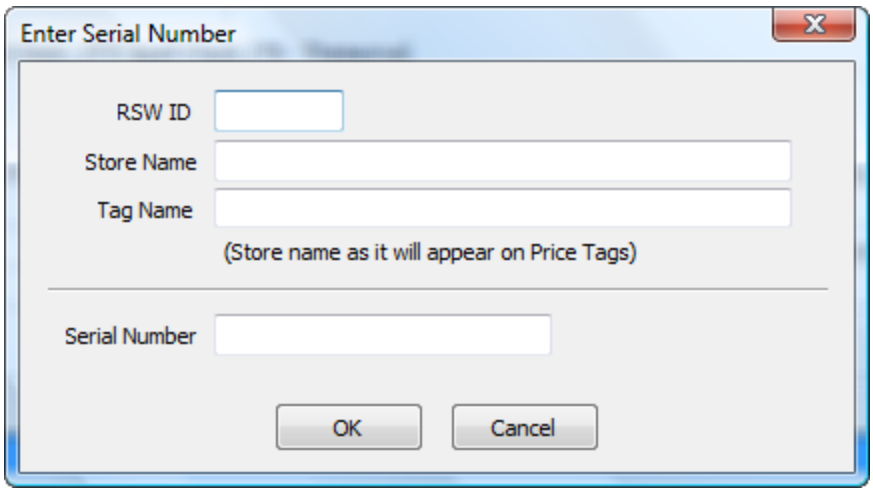
   a. Select **File → Training Mode**.

   b. Select the **Yes** button. Liberty will shut down.

   c. Skip the backup.

   d. **Start Liberty** again. You will be in **Real Mode**.

2. From the **Main Menu**, select **Help → Enter Serial Number**. The **Enter Serial Number** dialog will display:



3. Enter your unique Resaleworld **ID number** in the **RSW ID** field If you do not have this number, contact Resaleworld.
4. Enter your Store Name as it appears in the **Store Name** field in the **Store Information** dialog (**Tools** ➔ **Store Information**).
5. Enter the name of your store as it appears in the (Price) **Tag Name** field, which is also in the **Store Information** dialog. (The Tag Name is the name of your store as it appears on Price Tags and Labels).
6. Enter the serial number in the **Serial Number** field. Your Serial Number may be found with the Liberty Installation CD. If you do not have this number, contact Resaleworld.
7. Click the **OK** button.

WARNING: Entering a Store Name or Tag Name in the Store Information field that is different from the ones provided to Resaleworld when your serial number was created will keep you in Demonstration Mode. Demonstration Mode limits use of the software to a maximum of 20 accounts and 50 auctions launched.

Only one set of serial numbers will be issued for each individual software license. If your store changes its name, or you wish to change the name of your store as it appears on price tags, please contact Resaleworld. Please note there is a charge for this service that is separate from any support contracts.

> ***Note:*** *It's a good idea to store your serial number in more than one place. Doing so may eliminate the need to contact Resaleworld should they ever need to be re-entered.*

Related Topics

Enter Store Information

Install Liberty

Copyright 2010, Resaleworld.com, Inc.

Set Up

Copyright 2010, Resaleworld.com, Inc.

SET UP OVERVIEW

The heart of Liberty's power lies in the ability to customize it specifically for your operations to a very fine degree. Accordingly it is necessary to perform a number of steps to customize Liberty's default setting before using the program.

While it will take some time to customize Liberty especially for your business, we promise that the efficiencies ultimately gained, and the tremendous amount of time that will be saved will pay you back handsomely for the time invested.

To assist in setting up Liberty a series of checklists are provided. We suggest using the checklists provided to mark off each task as it is performed. These checklists are divided into three sections:

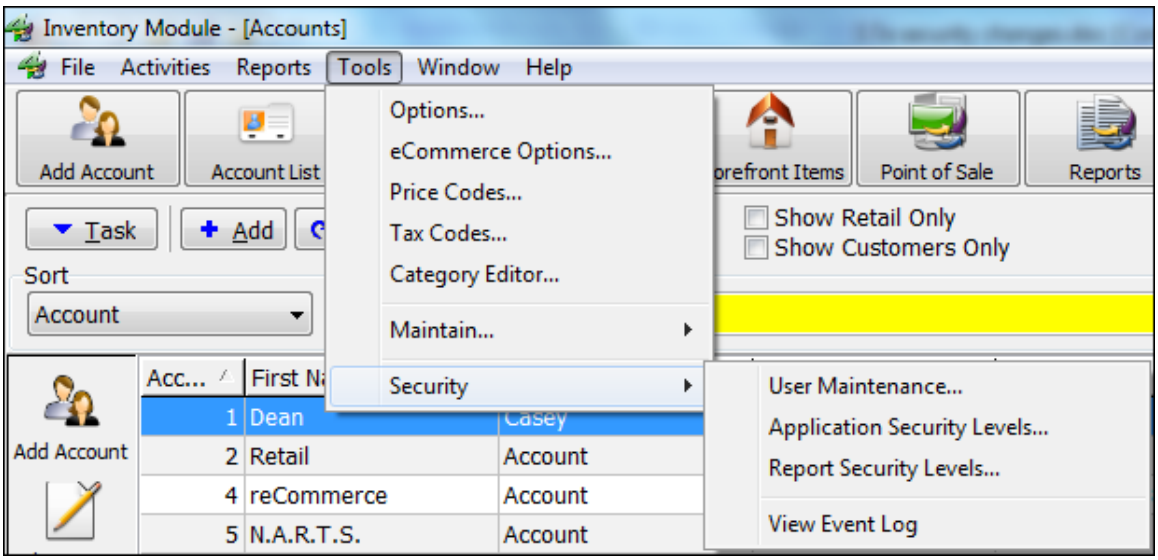
1. Required set up steps. All set up steps listed must be accomplished before starting to use Liberty.
2. Optional but recommended set up steps. While not strictly necessary, these set up steps cover aspects of the program that are often of great use.
3. Optional set up steps. Set up steps listed in this section are needed only by some stores to handle operations. It is recommended that this section be carefully reviewed to ensure maximum advantage is taken of Liberty's great overall flexibility and power.

At the top of many Help screens, particularly those contained in Liberty Inventory Set Up, you will see information similar to the following:

Inventory Module → *Tools* → *Security* → *Security Maintenance*

This information indicates where to find the routine covered by that section of help within the program. This is known as the **Path**. Usually the starting point for a Path is the Main Menu, which appears at the very top of the screen. The Liberty Inventory main menu is shown below.

Copyright 2010, Resaleworld.com, Inc.



For example, the **Path** shown above means you will find the routine by selecting **Tools** on the Main Menu (of Liberty Inventory), then selecting **Security** from the menu box, and then selecting **User Maintenance**.

> ***Note:*** *The setting up of Categories, Tax Types, Product Lines, and Attributes is a little complicated, as they are all interrelated. As a result we strongly recommend you read through the entire section entitled Set Up Categories, Attributes, Tax Codes, and Product Lines before performing any work in any of these areas.*

Related Topics

Starting the Liberty Program

SET UP WIZARD

The Set up Wizard automatically starts when the installation of Liberty finishes. The Set up Wizard allows you to set a number of defaults in Liberty, and runs this one time only, right after the program is installed. (All defaults contained in the Set up Wizard are available through the Liberty program at any time.)

Copyright 2010, Resaleworld.com, Inc.

SET UP CHECKLISTS

Required Set Up Steps

- Enter Store Information

  Inventory Module → Tools → Store Information

- Select Printers and Printing Defaults

  Inventory Module → Tools → Options → Printing

- Printout Headers And Footers

  Inventory Module → Tools → Options → Header/Footer

- Payment Accounts

  Inventory Module → Tools → Maintain → Payment Accounts

- Price Codes and Selling Fees

  Inventory Module → Tools → Price Codes

- Tax Codes

  Inventory Module → Tools → Tax Codes

- Product Lines

  Inventory Module → Tools → Category Editor → Product Line Tab

- Categories

  Inventory Module → Tools → Category Editor → Categories Tab

- Assign Product Lines to Categories

  Inventory Module → Tools → Category Editor → Categories Tab

- PoS Equipment

  PoS → Set up → Pos Set up

- PoS Preferences

  PoS → Set up → PoS Set up

Copyright 2010, Resaleworld.com, Inc.

- Terminal Ids (required for networks only)

  PoS → Set up → Maintain Terminals

- Assign Terminal Ids (required for networks only

  PoS → Set up → Pos Set Up → General tab (Terminal ID field)

Optional But Recommended Set Up Steps

- Account Defaults

  Inventory Module → Tools → Options → Account

- Item Entry Field Preferences

  (Inventory Module, from the Item Editor) Task → Edit Layout

- Transaction Types

  Inventory Module → Tools → Maintain → Transaction Definitions

- Payout Preferences

  Inventory Module → Tools → Options → Payout

- Attributes

  Inventory Module → Tools → Category Editor → Attributes Tab

- Payment Types

  PoS → Setup → Maintain Payment Types

- Fee Types

  PoS → Setup → Maintain Fee Types

Optional Set Up Steps

- Restrict Employee Access To Liberty

  Inventory Module → Tools → Security → User Maintenance

- Set Security Levels For Employee Access

  Inventory Module → Tools → Security → Application Security Levels

- General Defaults

  Inventory Module → Tools → Options → General Tab

Copyright 2010, Resaleworld.com, Inc.

- Change Layout of Account Fields

  (Inventory Module from the 1. Account tab) Task → Maintenance → Account Field Layout

- Fee Frequencies

  Inventory Module → Tools → Maintain → Fee Frequencies

- Spell Checking For Item Descriptions

  Inventory Module → 2. Inventory → Add → Description Field → F7

- Store Sections

  Inventory Module → Tools → Maintain → Sections

- Define Custom Field Names

  Inventory Module → Accounts → 7. Add'l Info Tab

- Filter Codes

  Inventory Module → Tools → Maintain → Filter Codes

- Store Locations

  Inventory Module → Tools → Maintain → Locations

- Expire Account Names

  Inventory Module → Tools → Maintain → Expire Group

- Product Lookups (PLUs)

  PoS → Setup → Maintain PLUs

- Item Descriptions

  PoS → File → Add New Item

Ecommerce Set Up Steps (Needed For Selling Online Only)

- Camera Defaults

  Inventory Module → Tools → Options → Camera

- General Ecommerce Settings

  Inventory Module → Tools → Ecommerce Options →General Tab

Copyright 2010, Resaleworld.com, Inc.

- Marketplace Options

  Inventory Module → Tools → Ecommerce Options →Marketplace Tab

- Ecommerce Accounts and Brokers

  Inventory Module → Tools → Ecommerce Options → Accounts Tab

- Internet Connection

  Inventory Module → Tools → Ecommerce Options → Connection Tab, or

  Order Manager → Tools → Options → Connection Tab

- Ecommerce Policies

  Inventory Module → Tools → Ecommerce Options → Policies Tab

- Shipping Options

  Inventory Module → Tools → Ecommerce Options → Shipping Tab

- Email Settings

  Inventory Module → Tools → Ecommerce Options → Email Settings Tab

- eBay Settings

  Inventory Module → Tools → Ecommerce Options → eBay Settings Tab

- Image Host Settings

  Inventory Module → Tools → Ecommerce Options → Image Hosts Tab

- Web Listing Fees

  Inventory Module → Tools → Price Codes

- Final Value Fees

  Inventory Module → Tools → Price Codes

- General Order Manager Settings

  Order Manager → Tools → Options → General Tab

- Customer Notification Email Preferences

  Order Manager → Tools → Options → Notification Email Tab

- Order Status Preferences

  Order Manager → Tools → Maintain Order Status List

Copyright 2010, Resaleworld.com, Inc.

- Fee Types

  Order Manager → Tools → Maintain Fee Types

- Payment Types Preferences

  Order Manager → Tools → Maintain Payment Types

- Payment Mappings

  Order Manager → Tools → Maintain Payment Mappings

Related Topics

Liberty Inventory Set Up Overview

Set Up PoS Default Preferences

ENTER STORE INFORMATION

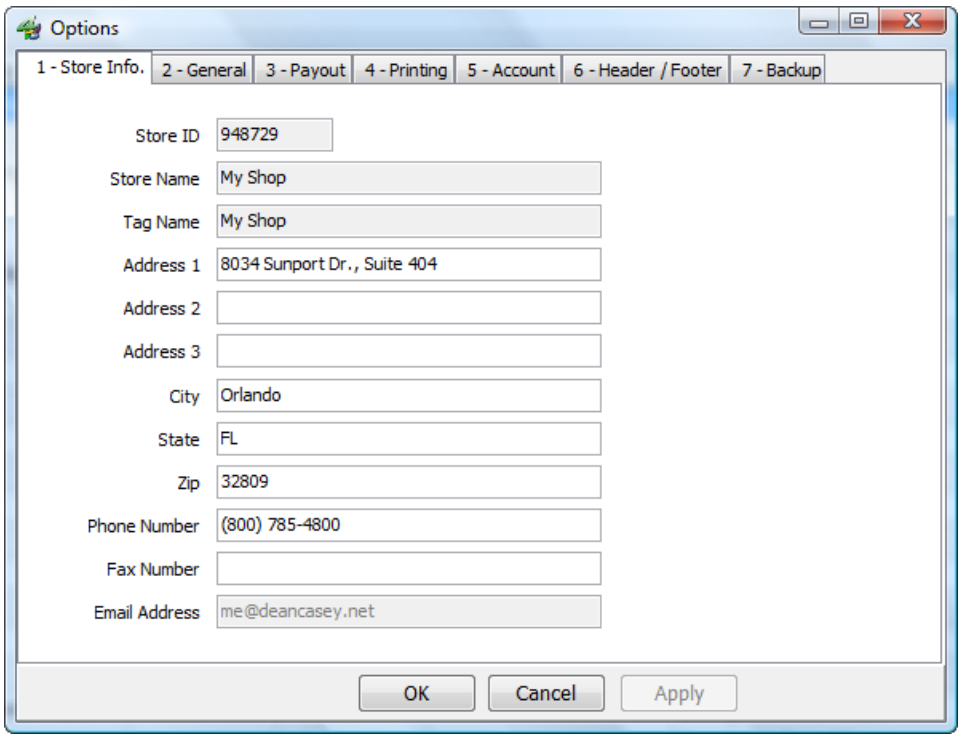
Inventory Module → Tools → Options → Store Info. Tab

Use the **Store Information** window to enter information about your store. The information entered here will print on various printouts generated by Liberty (receipts, item lists, price tags, etc.) Some of the information is also used to register the software with Resaleworld.

To Enter Store Information:

1. From the Main Menu, select **Tools → Options**. The Options window will open with the **1 - Store Information** tab displayed by default.

Copyright 2010, Resaleworld.com, Inc.



2. Enter your store's information in the various fields (described below).
3. When finished, click on the **Save** button.

STORE INFORMATION WINDOW FIELDS

Store ID The Store ID is simply displayed here. It is entered in the **RSW ID** field which is located in **Help ➔ Enter Serial Number**.

Store Name This field is not editable by the end user, because the store name is part of the serial number protection scheme in Liberty. Resaleworld places the name of your store exactly as provided when the software was purchased in this field.

Please see the section entitled Serial Numbers for more information.

Tag Name The Store Name as it appears on your price tags. The Tag Name cannot be edited by the user. This field can only be edited if it was originally assigned by Resaleworld.

Please see the section entitled Serial Numbers for more information.

Address 1, 2 and 3, City, State, Zip, Phone,and Fax. Use these fields to enter your business address and contact information.

Email This field displays the email address associated with this store. This field cannot be changed on this screen. The store's Email Address can be changed by going to **Tools > eCommerce Options > General Settings > Email Settings.**

Copyright 2010, Resaleworld.com, Inc.

Related Topics

Serial Numbers

Set Up Headers and Footers

SELECT PRINTERS & PRINTING DEFAULTS

Inventory Module → Tools → Options → Printing Tab

Use the **Printing Options** window (below) to set which printer is to be used to print tags, which for receipts and which for checks. Use it as well to set preferences for how the price tags print. See the table below for a description of the purpose of each field.

Printers must first be set up to work under Windows before Liberty can use them. To add new printers to your system, please consult your Windows operating system's Help file, or contact a qualified computer technician.

> ***Note:*** *There is no field for setting which printer to print reports and item lists on. This is because Liberty automatically prints all reports and item lists on the printer that is set as the Default printer in Windows. It is necessary to set your system so the Default printer is the printer you wish to print reports and item lists on (one that prints regular 8½ x 11 paper).*

To Determine Which Printer is the Default Printer

1. Select **Start → Settings → Printers**, or **Start → Control Panel → Printers**.
2. Look for the printer icon with a small white check mark on a round, black background located at the upper left of the printer icon. This is the default printer.

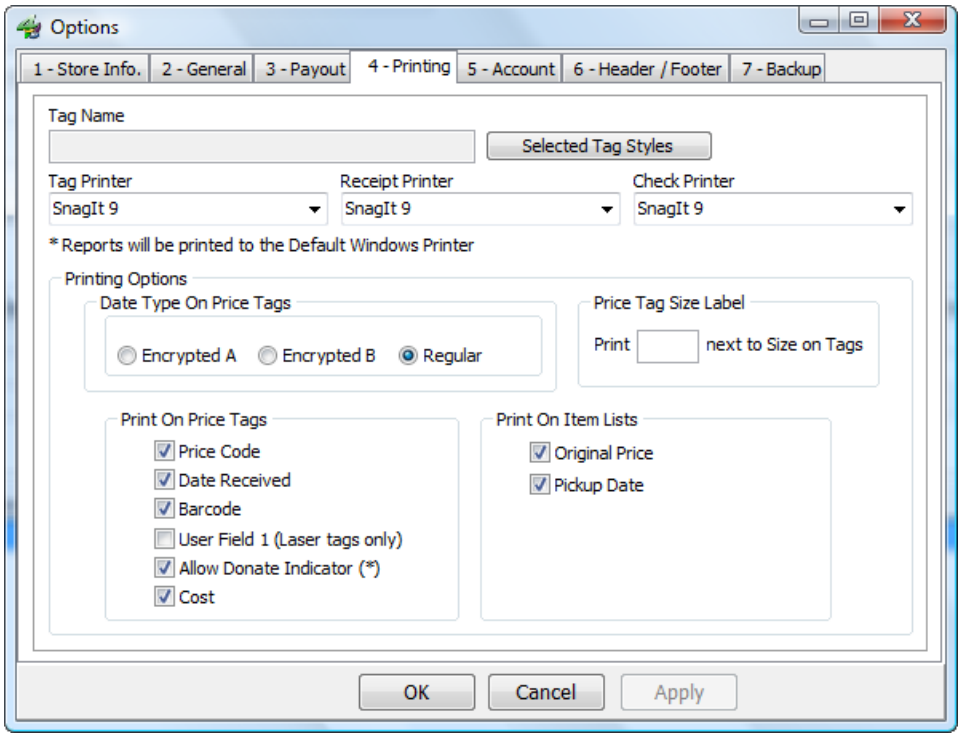
Copyright 2010, Resaleworld.com, Inc.

To Change the Default Printer

1. Select **Start** → **Settings** → **Printers**.
2. Right click on the desired printer.
3. Choose **Set as Default Printer** from the menu that displays.

To Set Printing Defaults:

1. From the Main Menu, select **Tools** → **Options**.
2. Click on the **4 - Printing** tab. The Printing dialog will display:



Printing Tab Fields and Definitions

Tag Name — This is the Store Name as it appears on your price tags. This information is entered when the serial numbers are entered, and cannot be changed except by calling Resaleworld. There is generally no charge for assistance changing this field when first setting up the software, however, subsequent changes may incur a fee.

Selected Tag Styles — Liberty prints a wide variety of price tags and labels. These tags and labels come in a variety of sizes and print in various formats.

Copyright 2010, Resaleworld.com, Inc.

Remove the checks from any selections you will not be using: doing so will reduce the number of options that appear when you select the **Tag Format** drop-down in the Print Price Tags dialog when printing price tags.

Please note the following:

- **2622/2722** and **Orion/2443** refer to Zebra thermal printers – they are model number or model name for two different printer models;
- **Datamax** is a likewise a thermal printers, but is no longer used as tags are no longer available for this format;
- **Mini** and **Jewelry** tags require the use of a thermal printer; and
- Regarding **Dot Matrix** and **Thermal** printers, not all dot matrix and thermal printers work! Be sure to only purchase printers that are specifically recommended by Resaleworld.

Tag Printer Select the printer you will use to print tags.

> ***Important Note about Price Tag Printers.***
> *Do not purchase just any printer to print price tags.*

Price tags require special printers, and only a very few, specific printers are guaranteed and supported by Resaleworld to work. The Resaleworld Sales Department will be pleased to provide more information.

Receipt Printer Select the printer you will use to print receipts.

Check Printer Select the printer you will use to print checks and reports.

Checks and other supplies are available from Resaleworld by calling our supplies line. Checks, price tags and other supplies are available from Resaleworld at very low prices, and are ***guaranteed to work with Liberty.***

> ***Important Note About Ordering Checks***
> *Some printers require paper to fed face down. Ink jet printers such as the HP 840 are an example. When ordering checks for such printers, be sure to instruct the manufacturer to deliver the checks in reverse chronological order. (There is no extra charge for this when ordering checks from Resaleworld.) This way the checks*

Copyright 2010, Resaleworld.com, Inc.

will feed in the proper order.

*Changing the printer's properties in the print driver to Start Printing from Last Page is **NOT** recommended. Doing so will interfere with your ability to Restart a check run if a problem is encountered.*

Date Type Price Printing Tags

Encrypted A Select to use a six-digit date code. This option starts with the Regular date format, removes the forward slash marks and the first number in the year, and then adds a 1 to the beginning and end of the remaining numbers.

Example: 07/31/00 becomes 173101.

Encrypted B Select to use a letter number combination for the date. This option substitutes the month for a letter, where A=January, B=February, etc. The letter is followed by the day of the month and year is dropped.

Example: July 31, 2000 becomes G31.

Regular Select to print a date in the MM/DD/YY format.

Print on Price Tags

Price Tag Size Label When the size prints on the price tag or label, it normally stands alone with no label. To print a label, such as the word **Size** or **Sz**, enter **Size** or **Sz** (or whatever) in this field.

Price Code Select to include the price code on price tags.

Date Received Select to include the date the item was received on price tags.

Barcode Select to include a bar code for use with a **Bar Code Reader** (aka **BCR** or **Scanner**) on price tags.

User Field 1 Select to include **User Field 1**. This is set up in the User Defined Fields in the Account.

Allow Donate Indicator (*) Select to indicate an item should be donated by printing an asterisk (*) next to the Price Code on price tags.

Cost Select to show the **Cost** of the item on price tags. For consigned items, the **Cost** is only printed if a **Preset Net** is entered.

Price tags for items with a **Preset Net** contain a series of numbers instead of the letter(s) denoting the **Price Code**. This series of

numbers is the **Preset Net** to the consignor in coded form. $450.00 will appear as 100450001. Drop the 1's and leading 0's, place a decimal two places in from the right, imagine a dollar sign dancing in front of your (consignor's eyes in this case) and you have $450.00.

Print On Item Lists

Original Price	Select to include an item's original price on the Item List.
Pickup Date	Select to include the date that items are scheduled to be picked up on the Item List printout. Please see the section entitled Pickup and Expire Options for more information on Pickup Dates.

3. Make changes to the default fields as required.
4. When finished, click on the **Apply** button to save your changes. Click **OK** to close the Options dialog.

Related Topics

Print Price Tags and Price Labels

Printing Checks

Price Tag and Label Formats

Computer Equipment Recommendations (Printers, Bar Code Readers, etc.)

SET UP HEADERS AND FOOTERS

Inventory Module → *Tools* → *Options* → *Header/Footer Tab*

You can define what prints in the header and footer sections of the following printouts:

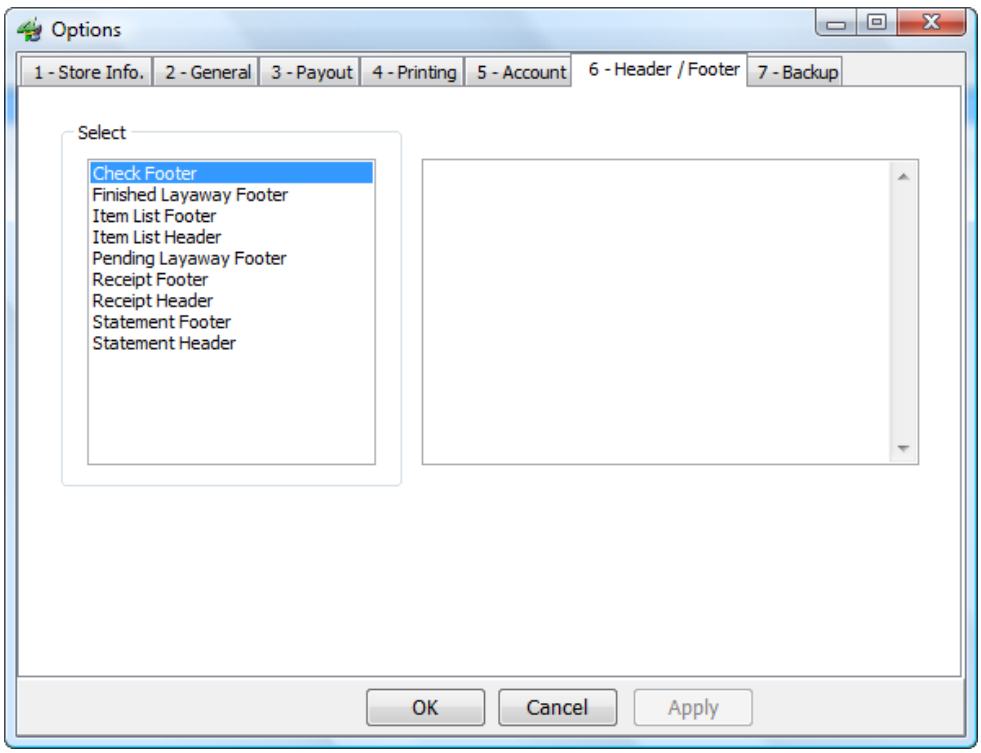
Copyright 2010, Resaleworld.com, Inc.

- **Statements** (**Cash Payout Statements** signed and dated by consignors when they are paid with cash instead of a check. Cash Payout Statements are retained by the store to provide a written record of cash payouts)
- **Item Lists** (an inventory list to give to consignors)
- **Point of Sale Receipts**. There are two types of receipts:
- **Layaway**. There are two types:
- **Pending Layaway Footer**. Use to list layaway terms and conditions, etc.>
- **Finished Layaway Footer**. Use to show same information as for a regular purchase, plus additional information pertinent to layaways.
- **Checks** (footer/message only).

Note: *It is not necessary to enter the store name, address or phone in the Headers, as this information is automatically printed by Liberty based on the information entered in Store Information.*

To Define a Header or Footer

1. From the main menu, click on **Tools** ➔ **Options**. The **Options** dialog box displays.
2. Click on the **6 - Header/Footer** tab. The Header/Footer window will display:



3. Click on the **Header** or **Footer** you want to define.

4. Click in the message box and type your message.
5. Click the **Save** button when you are done typing your message.

> ***Note**: Leave the Check Footer Message box empty if you want a list of items sold to appear on a check.*

Related Topics

Printing Checks

Enter Store Information

Set Up PoS Equipment

SET UP PAYMENT ACCOUNTS

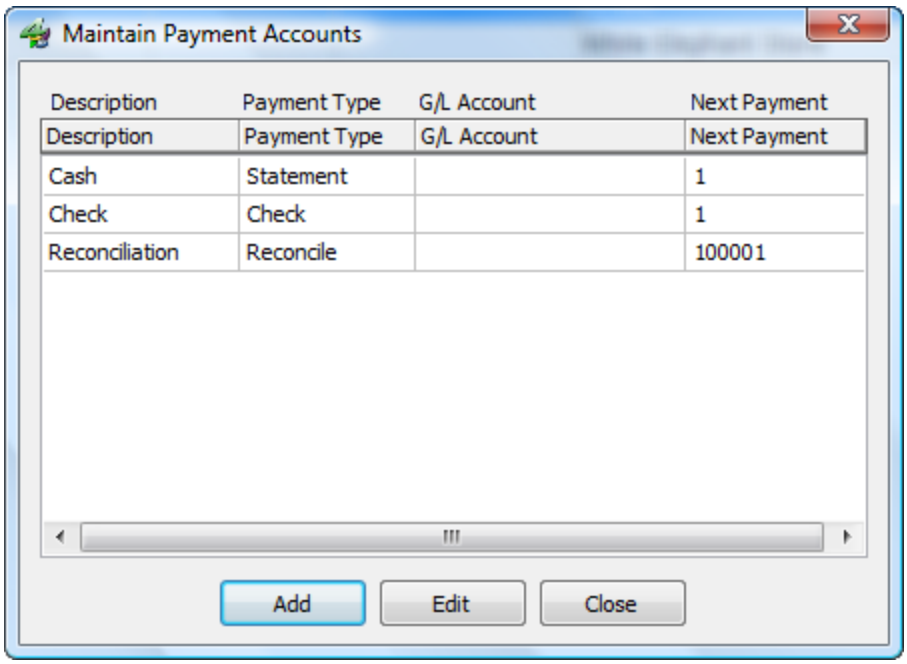
Inventory Module ➔ *Tools* ➔ *Maintain* ➔ *Payment Accounts*

When making payouts a bank account must be selected in the **Pay from Account** field. Bank accounts are set up using **Payment Accounts**. You can have more than one bank account.

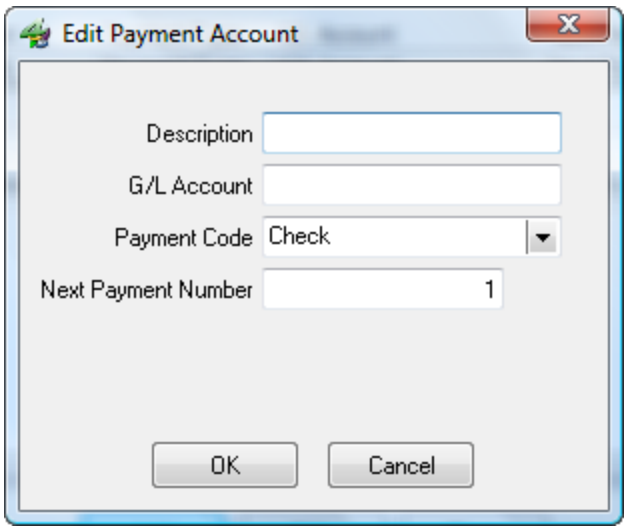
To Set Up A Payment Accounts:

1. From the main menu, click on **Tools** ➔ **Maintain** ➔ **Payment Accounts**. The **Maintain Payment Accounts** window displays.

Copyright 2010, Resaleworld.com, Inc.



2. Select the **Add** button. The **Edit Payment Account** window displays.



3. Enter a description in the **Description** field. Use the name of the bank - for instance, *Washington Mutual Bank Checking Account*.
4. If you are using accounting software with Liberty, enter the appropriate **General Ledger** (GL) account number in the Account field.
5. Select either "Statement" (Cash) or "Check" from the **Payment Code** drop-down list.
6. Enter the next payment number for this account in the **Next Payment Number** field. For instance, enter the next check number.
7. Select the **OK** button when finished

Copyright 2010, Resaleworld.com, Inc.

> ***Note**: When paying multiple accounts, only accounts that have been set for the payment account will be paid. In other words, an account with the default payment account set to Cash will not be paid when paying multiple accounts by Check.*

Related Topics

Pay One Account

Pay Multiple Accounts

Change Payment Account for Multiple Accounts Simultaneously

PRICE CODES OVERVIEW

Inventory Module → *Tools* → *Price Codes*

Price Codes are required for use by consignment stores. Skip this section if you are utilizing Liberty in a store that does not take any items on consignment.

The primary difference between a consignment store and a resale or retail store is that resale and retail stores purchase items outright and then sell them at a (hopefully) higher price in order to make a profit. A consignment store, on the other hand, only pays the consignor for an item if, and after, the consigned item sells. As a result, in a consignment store it is necessary to establish what amount of money from a sale is kept by the store and what amount of money is paid to the consignor. We refer to this as the **Consignment Split**.

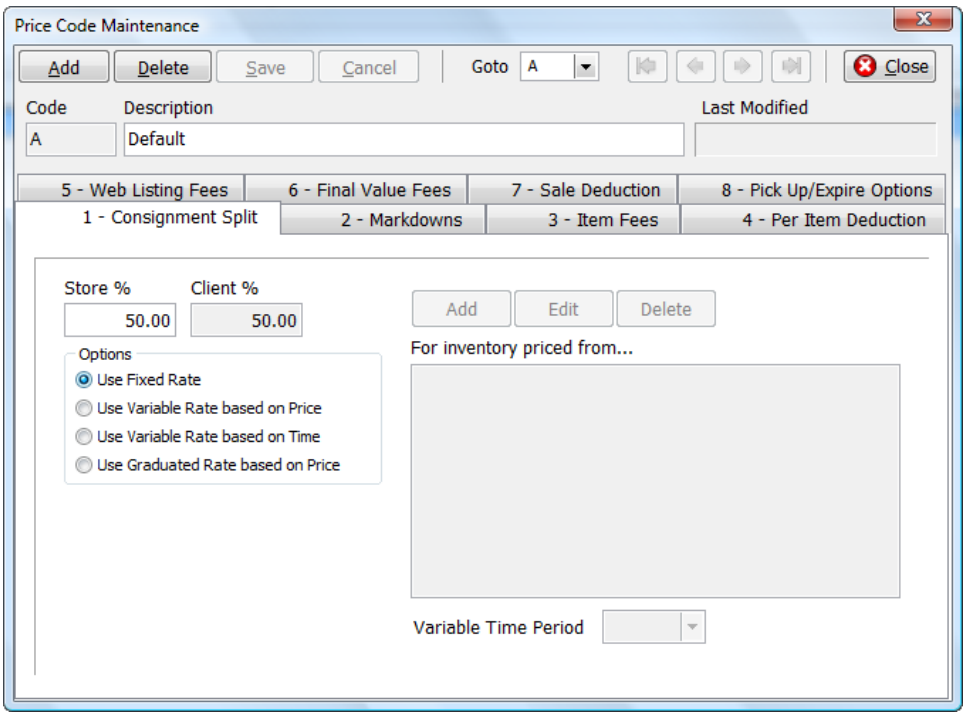
Price Codes are used to establish the Consignment Split. Liberty also uses Price Codes to control a number of other aspects of sales and the amounts paid to the consignors, including

- Automatic Markdowns
- Item Fees
- Item Deductions
- Sale Deductions
- Pickup Periods

Copyright 2010, Resaleworld.com, Inc.

- Expire Periods
- Web Listing Fees
- Final Value Fees

Viewing the Price Code Maintenance window provides an overview of how Liberty is used to control these various parameters:



Liberty comes with one Price Code – Price Code ***A*** – ready to use but with just the consignment split set to 50/50. (No fees have been established.) An unlimited number of Price Codes may be created. There is likewise no limit to the number of Web Listing and Final Value Fees.

Related Topics

Define Price Codes

Expire Post

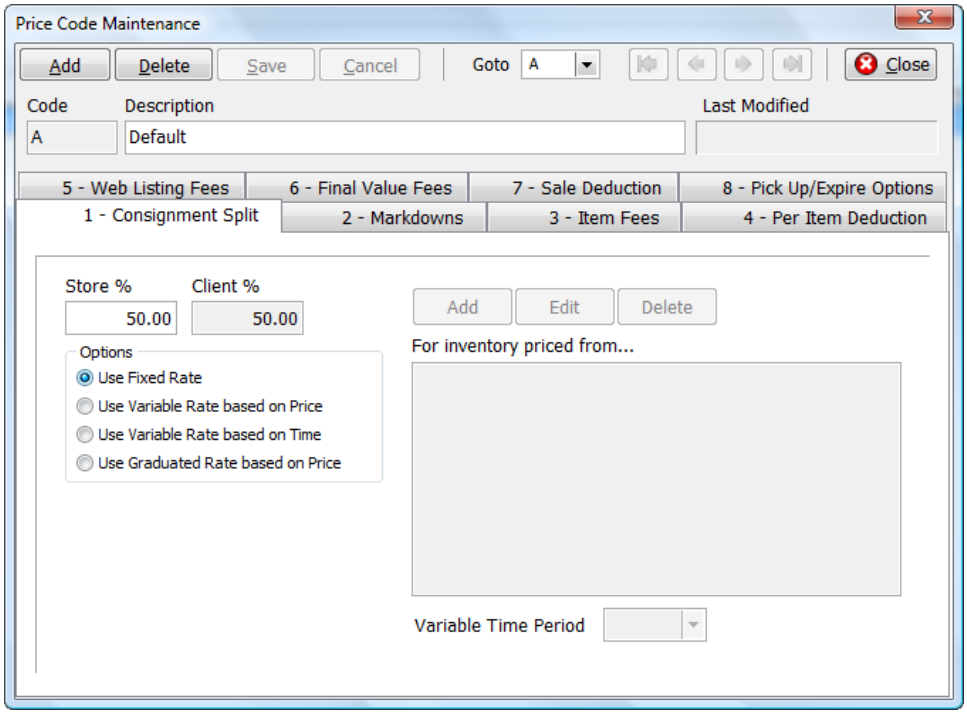
DEFINE CONSIGNMENT SPLITS

Inventory Module → Tools → Price Codes

Price Codes are specified with a one or more letters, such as A, B, C etc. Each Price Code has its own set of unique parameters. For instance, Price Code A might be set up to have a 50/50 split with the consignor, an automatic markdown of 20% after 30 days and 50% after 60 days, and a $1.00 item Fee. Price Code B might be set up to have a 60/40 split with the consignor with no markdowns and no item fee, etc.

To Add A Price Code:

1. Select **Tools** → **Price Codes** from the Main Menu. The Price Code dialog will display with Price Code A populated:



2. If modifying Price Code A, go to step 3. If adding a new Price Code, click the **Add** button. The next available letter will be automatically assigned.

3. Enter a **Description** and **Store %**. The Consignor Percent field is automatically filled in based on the value entered in the **Store %** field.

4. Click **Save** when finished.

Note the **Options** below the **Store %** field. Liberty defaults to a **Fixed Rate** for the consignment split. This means the split (e.g. 50/50) remains constant. Other methods of splitting the proceeds with consignors exist, including a Variable (Consignment) Rate based on either Price or Time and a Graduated Rate based on Time. See the section entitled Variable and Graduated Rate Splits for more information.

Copyright 2010, Resaleworld.com, Inc.

To Modify A Price Code:

1. Go to the Price Code to be changed. Do this by either a) clicking on the Jump buttons (the triangles on their sides that point left or right), or b) clicking on the **Goto** drop-down menu and selecting the price code to be modified.
2. Change the **Price Code** as necessary.
3. Click the **Save** button.

To View Other Price Codes:

1. Click on the **Jump** buttons (the triangles on their sides that point left or right) or click on the **Goto** drop-down menu and select the price code to be modified. There is no limit to the number of Price Codes.

PRICE CODE DIALOG FIELDS

Code	The Price Code letter. Each Price Code identifies a specific set of parameters.
Description	Enter a name for the price code that describes the price code parameters. **Example:***50/50* describes a price code where the item's sale price is split 50-50 between the store and the client.
Store %	Percentage of the actual selling price the store keeps.
Client %	Percentage of the actual selling price paid to the consignor.

OPTIONS

Fixed Rate	Assigns an unchanging percentage consignment split.
Use Variable Rate based on price	In most stores, the split is a specific percentage of the price at which the item(s) sell. Some stores, however, change the split as the price of the item increases. Our term for this is **Variable Split Based On Price**. With a Variable Split Based on Price the split is determined by the amount the item sells for. When enabled, the Variable Split over-rides the split in the Store % and Client % fields at the top of the Price Codes window. For example, you could set Liberty to split sales of items from $0-

Copyright 2010, Resaleworld.com, Inc.

	$9.99 at 60/40, $10.00-$24.99 at 55/45, and $25.00 and up at 50/50. For more information, see the section entitled Variable & Graduated Rate Splits.
Use Variable Rate based on time	**Variable Split Based on Time** allows you to change the consignor's split based on how long it takes for the item to sell. For example, you could set up the markdown code to provide a 50/50 split if the item sells between day 1 and day 30, a 60/40 split if it sells between day 31 and day 60, and a 70/30 split if it sells after the 60th day. Select to set the store-to-client split on the price of an item based on how long the item has been in the store. Click on the Variable Rate tab to set price and percentage markdowns. For more information, see the section entitled Variable & Graduated Rate Splits.
Use Graduated Rate Based on Price	Use Graduated Rate Based on Price works the same as a Variable Rate Based on Price, except the amount the client receives is **cumulative**. For example, you could set the Graduated Rate to be the same as in the example for the Variable Rate Based on Price given in the example above, with items from $0-$50.00 at 60 (to the store)/40 (to the client), and $50.01 and up at 50/50. In this case, however, the client will receive $45.00 instead of $50 (40% x $50) + 50% * $50) = $20 + $25 = $45. For more information, see the section entitled Variable & Graduated Rate Splits.

Related Topics

Price Codes Overview

VARIABLE AND GRADUATED RATE SPLITS

Inventory Module ➔ *Tools* ➔ *Price Codes*

The term **Split** is used to indicate what percentage of a sale goes to the consignor and what percentage goes to the store. In most stores, the split never changes. This is termed a **Fixed Rate** split.

It is possible to change the split as the price of an item changes, or as time passes. The terms for these types of splits are:

- Variable Rate (Split) Based on ***Price***
- Variable Rate (Split) Based On ***Time***
- Graduated Rate (Split) Based on ***Price***

With the **Variable Rate Based on Price**, the split is based on the ACTUAL selling price.

Example: Items that sell for less than $25 have a 60/40 split (40 to the client).

Items that sell for more than $25 have a 50/50 split.

For an item selling for $100, the client receives $50.

> ***Note:*** *It is possible to use one, or the other, but not both in the same Price Code. Different Price Codes may utilize different Variable Rates.*

With the **Variable Rate Based on Time**, the split is based on the length of time since the item was received.

Example: Items that sell in the first 30 days have a 50/50 split.

Items that sell after the first 30 days have a 60/40 split.

The **Graduated Rate Based on Price** works the same as a Variable Rate Based on Price, except the amount the client receives is based on a **cumulative formula**.

Example: Items that sell for less than $25 have a 60/40 split (40 to the client).

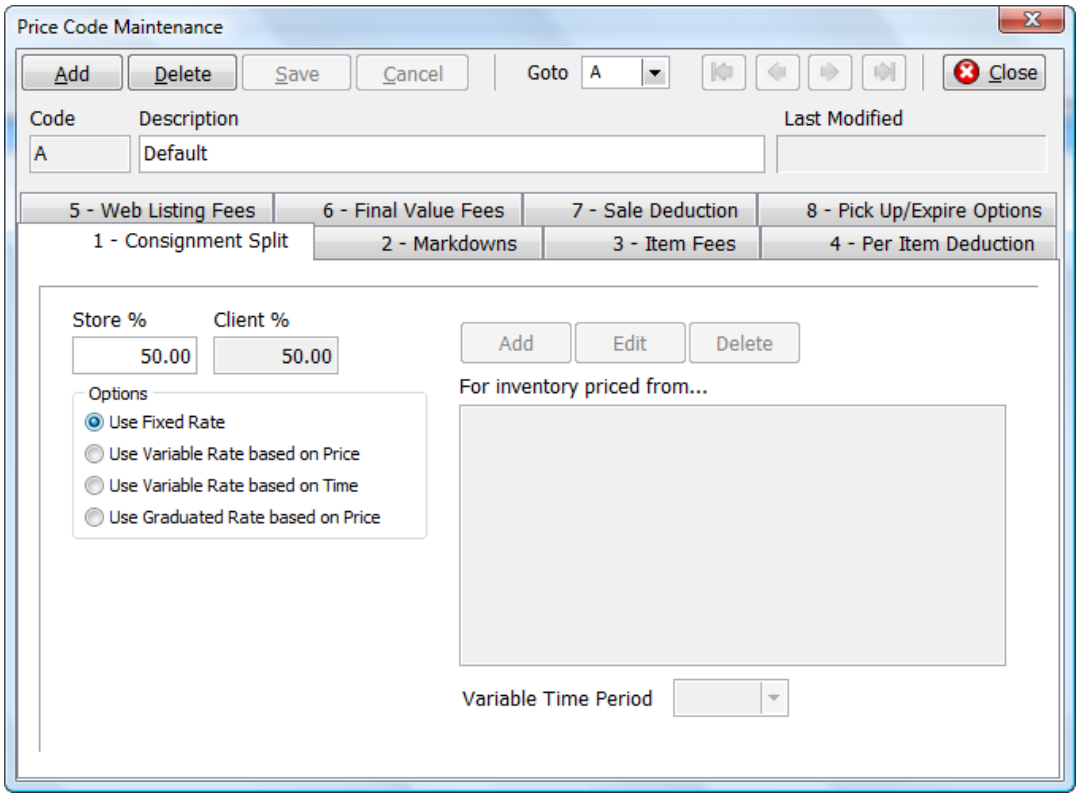
Items that sell for more than $25 have a 50/50 split.

For an item selling for $100, the client will receive $45.00 instead of $50. This is because of the cumulative nature of the formula used to calculate what the client receives: (40% x $50) + 50% * $50) = $20 + $25 = $45.

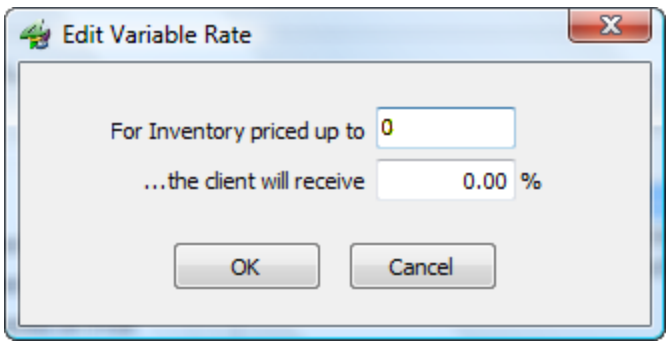
Copyright 2010, Resaleworld.com, Inc.

To Use A Variable Rate Split Based On Price:

1. Select **Tools** → **Price Codes** from the Main Menu. The Price Code dialog will display:



2. Use the **Jump** buttons to display the correct Price Code (A, B, C, etc.).
3. Under **Options**, select **Use Variable Rate Based on Price**.
4. Select the **Add** button. The Edit Variable Rate dialog will display:



5. Enter information as needed in the **Edit Variable Rate** dialog, and click **OK**.
6. Continue selecting the **Add** button on the **Variable Rate** panel and entering the necessary parameters in the Edit Variable Rate dialog(s). There is no limit to the number of

Copyright 2010, Resaleworld.com, Inc.

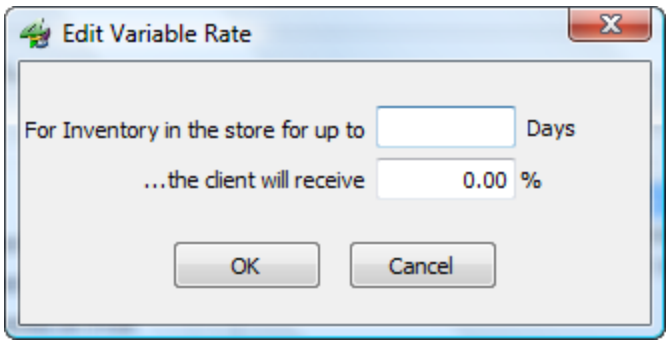
price levels for which the split changes.

7. When finished select the **Save** button at the top of the Price Code dialog.

Note: *When Variable Rate Based on Price for a particular Price Code (A, B, C, etc.) is enabled, the rates specified in the Variable Rate panel will override the Rate set at the top of the Price Code dialog for that particular Price Code.*

To Use A Variable Rate Split Based On Time:

1. Select **Tools** → **Price Codes**. The **Price Code** dialog will display.
2. Use the **Jump** buttons to display the correct Price Code (A, B, C, etc.).
3. Under **Options**, select **Use Variable Rate Based on Time**.
4. Select the **Add** button. The Edit Variable Rate dialog will display:



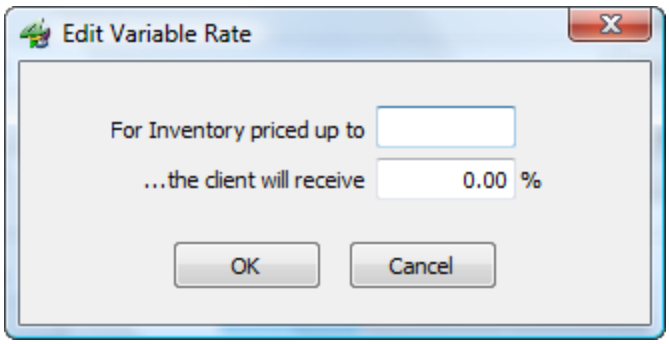
5. Enter information as needed in the **Edit Variable Rate** panel, and click **OK**.
6. Continue selecting the **Add** button located below the **Variable Rate** panel and entering the necessary parameters in the Edit Variable Rate dialog(s). There is no limit to the number of time periods for which the split changes.
7. Make the appropriate selection (Days, Weeks, Months, 1st/16th) from the **Variable Time Period** drop-down.
8. When finished select the **Save** button at the top of the dialog.

Note: *When Variable Rate Based on Time for a particular Price Code (A, B, C, etc.) is enabled, the rates specified in the Variable Rate panel will override the Rate set at the top of the Price Code dialog for that particular Price Code.*

Copyright 2010, Resaleworld.com, Inc.

To Use A Graduated Rate Based On Price:

1. Select **Tools** → **Price Codes**. The **Price Code** dialog will display.
2. Use the **Jump** buttons to display the correct Price Code (A, B, C, etc.).
3. Under Options, select **Use Graduated Rate Based on Price**.
4. Select the **Add** button. The Edit Variable Rate dialog will display:



5. Enter information as needed in the **Edit Variable Rate** panel, and click **OK**.
6. Continue selecting the **Add** button located below the **Variable Rate** panel and entering the necessary parameters in the Edit Variable Rate dialog(s). There is no limit to the number of price levels for which the split changes.
7. When finished select the **Save** button at the top of the dialog.

Note: *When Graduated Rate Based on Price for a particular Price Code (A, B, C, etc.) is enabled, the rates specified in the Variable Rate panel will override the Rate set at the top of the Price Code dialog for that particular Price Code.*

Related Topics

Define Price Codes

PER ITEM DEDUCTIONS

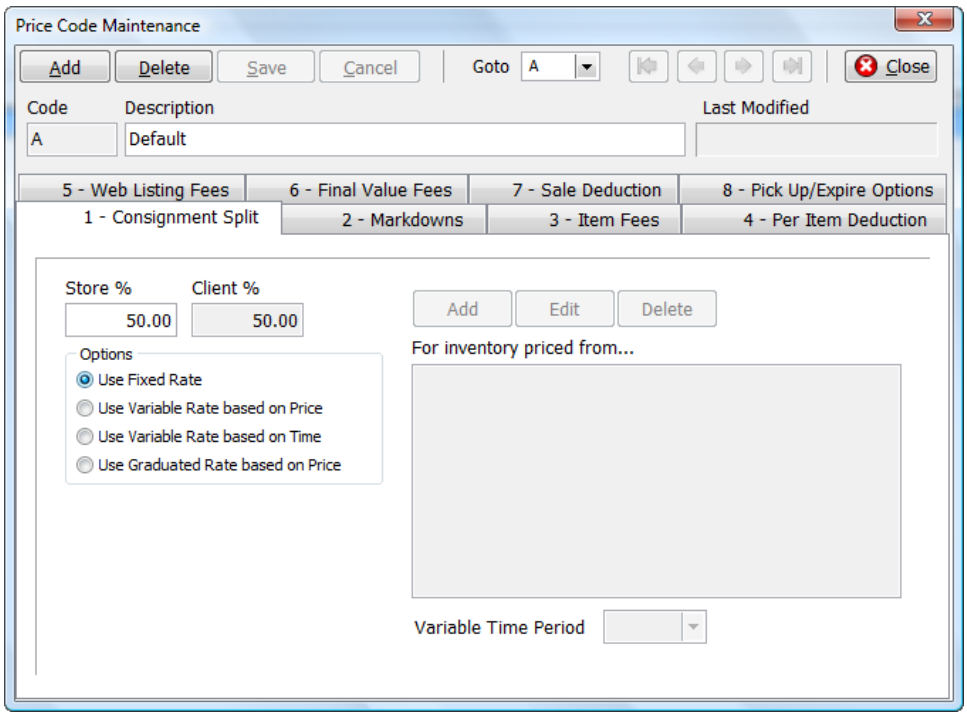
Per Item Deductions allow fees to be assessed to consigned items. Per Item Deductions are different from **Sale Deductions** and **Item Fees.** Per Item Deductions are paid by consignors on each item consigned, regardless of whether the items sell or not. Sale Deductions are paid by the consignor, but only for items that sell. Item Fees are paid by the customer, and only for items that are purchased.

When a Per Item Deduction is assessed, the Deduction (fee) is posted to client's Transaction History. Per Item Deductions reduce the amount the consignor receives.

Per Item Deductions may vary depending on the price of items. For instance, items that sell for less than $100.00 might have a deduction of $1.00, and those that sell for more have a deduction of $2.00. There is no limit to the number of different price levels and deductions that may be established.

To Implement Per Item Deductions

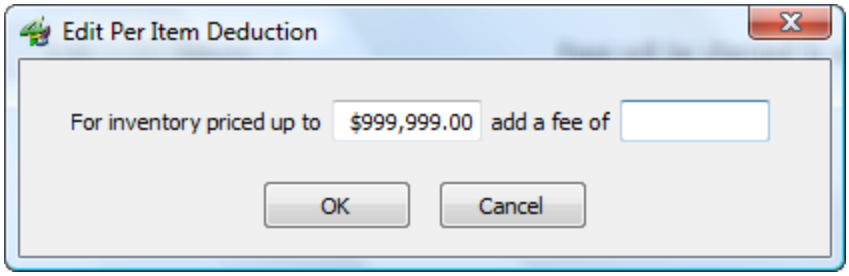
1. Select **Tools** → **Price Codes** from the Main Menu. The Price Code Maintenance dialog will display:



2. Select the **Price Code** for which you wish to implement a **Per Item Deduction**. Use the

Jump buttons to navigate between Price Code letters.

3. Select the **4-Per Item Deduction** tab.
4. Click the **Add** button (the one located in the middle of the Price Code dialog, not the one at the top of the dialog). The Per Item Deduction dialog will display:



5. Enter the appropriate information in the **Edit Per Item Deduction** dialog.
6. Click **OK**.
7. Enter additional Per Item Deduction parameters as necessary.
8. When finished click on the **Save** button at the top of the Price Code window.

Related Topics

Price Codes Overview

SALE DEDUCTIONS

Inventory Module → Tools → Price Codes → 7-Sale Deduction Tab

Sale Deductions add or subtract from the amount owed to a consignor. They are applied only if an item sells. Sale Deductions appear in the consignor's Transaction History.

The amount of the Sale Deduction may be either a positive number or a negative number. When the Sale Deduction is a positive number, the amount of the Deduction is *subtracted* from the consignor's account, thus *reducing* the amount the consignor will be paid. When the Sale Deduction is a negative number, the amount of the Deduction is *added* to the consignor's account, thus *increasing* the amount the consignor will be paid.

Copyright 2010, Resaleworld.com, Inc.

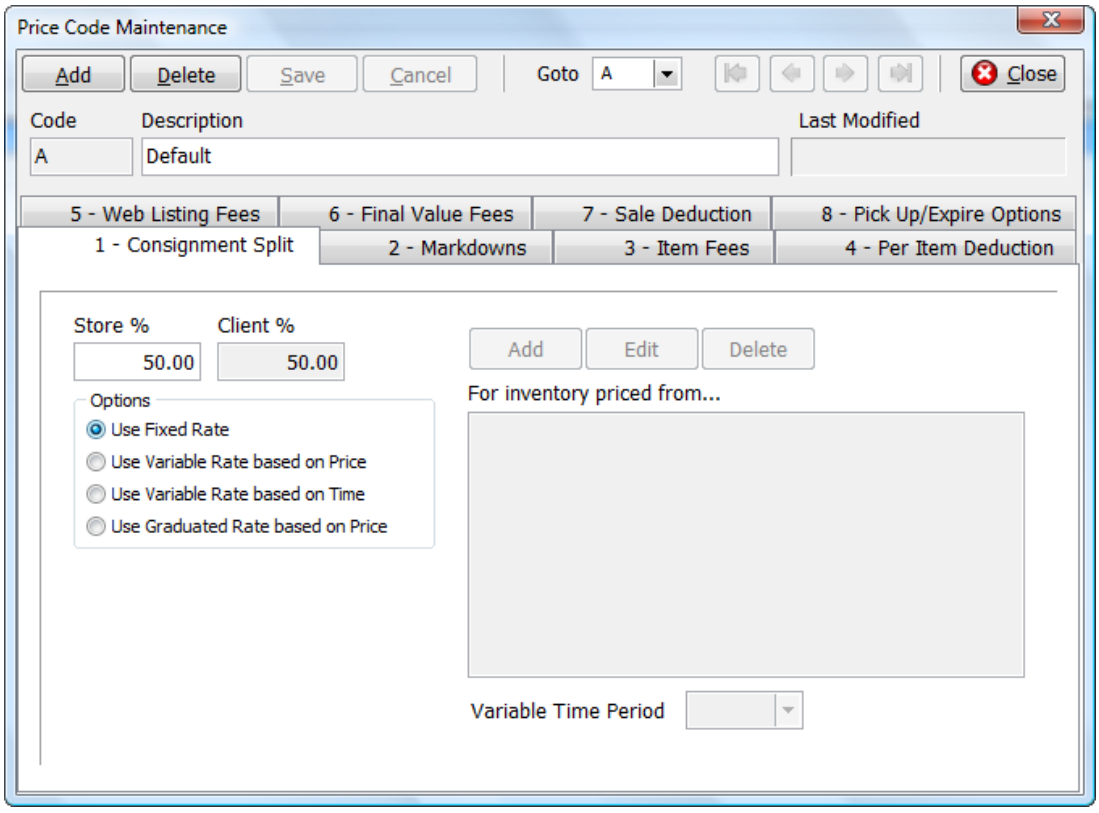
An example of when a positive Sale Deduction is used would be when a store wishes to charge an additional fee when an item sells. If the item does not sell, then the consignor is not charged this fee.

An example of when a negative Sale Deduction is used would be when a store uses the Web Listing Fee to charge a mandatory minimum listing fee, and the store wishes to rebate the fee whenever items sell. In other words, if the item does not sell no Sale Deduction is applied and the consignor pays the Web Listing Fee. On the other hand if the item does sell, then the Web Listing Fee is cancelled out by the Sale Deduction Fee. (In this case the term Sale Deduction is actually a misnomer, since it is actually a credit.)

Note that each Price Code has its own Sale Deduction Fee (different Sale Deductions can be charged with different Price Codes).

To Implement a Sale Deduction:

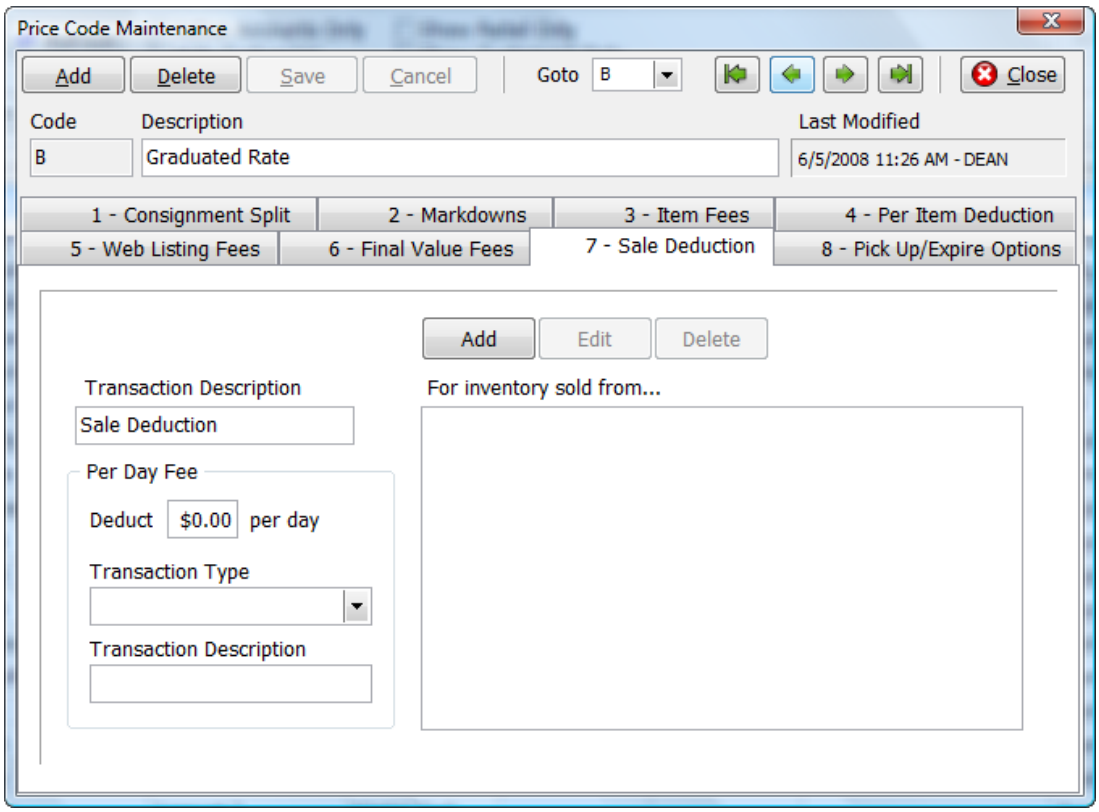
1. Select **Tools** → **Price Codes** from the Main Menu. The Price Code dialog will display.



2. Select the **Price Code** for which you wish to implement a **Sale Deduction**. Use the Jump buttons to navigate between Price Code letters.

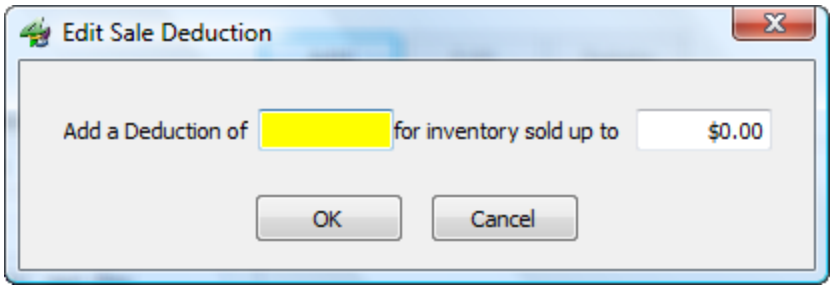
3. Select the **7-Sale Deduction** tab.

Copyright 2010, Resaleworld.com, Inc.



4. Enter a name for the Sale Deduction in the **Transaction Description** field.

5. Click the **Add** button (the one located in the middle of the dialog on the Sale Deduction panel, not the one at the top of the dialog). The **Edit Sale Deduction** dialog will display:



6. Enter the appropriate information in the **Edit Sale Deduction** dialog, then click **OK**. If the amount of the fee varies depending on the selling price of the item, repeat this step as needed.

   Example #1: For a Sale Deduction to **subtract** from the consignor's account $15.00 for items selling for less than $100.00 and $25.00 for items priced $100.00 and up:

   a. Enter 15.00 in the field following **Add a Deduction of**, and 99.99 in the field following **for inventory sold up to**, then select **OK**.

   b. Highlight the second entry in the Sale Deduction panel which says *For inventory*

Copyright 2010, Resaleworld.com, Inc.

sold from $100.00 to 999999.00 charge a $15.00 deduction, then select the **Edit** button.

c. Enter 25.00 in field following **Add a Deduction of**, then select the **OK** button.

Example #2: For a Sale Deduction to **add** to the consignor's account $10.00 for items selling for less than $100.00 and $20.00 for items priced $100.00 and up:

a. Enter **-**10.00 in the field following **Add a Deduction of**, and $99.99 in the field following **for inventory sold up to**, then select **OK**.

b. Highlight the second entry in the Sale Deduction panel which says *For inventory sold from $100.00 to 999999.00 charge a $10.00 deduction*, then select the **Edit** button.

c. Enter **-**20.00 in the field following **Add a Deduction of**, then select the **OK** button.

7. When finished click on the **Save** button at the top of the Price Code window.

Note: *To change the name Sale Deduction to something else in the Transaction History, change the contents of the Transaction Description field in the Sale Deduction panel.*

Related Topics

Web Listing Fees

Final Value Fees

Price Codes Overview

Re-List Items

View Transaction History

PICKUP AND EXPIRE OPTIONS

Pickup Period

Stores often allow consignors to pickup items that do not sell after a certain time period has transpired. The Pickup Period field, located on the Pickup and Expire Options tab under Price

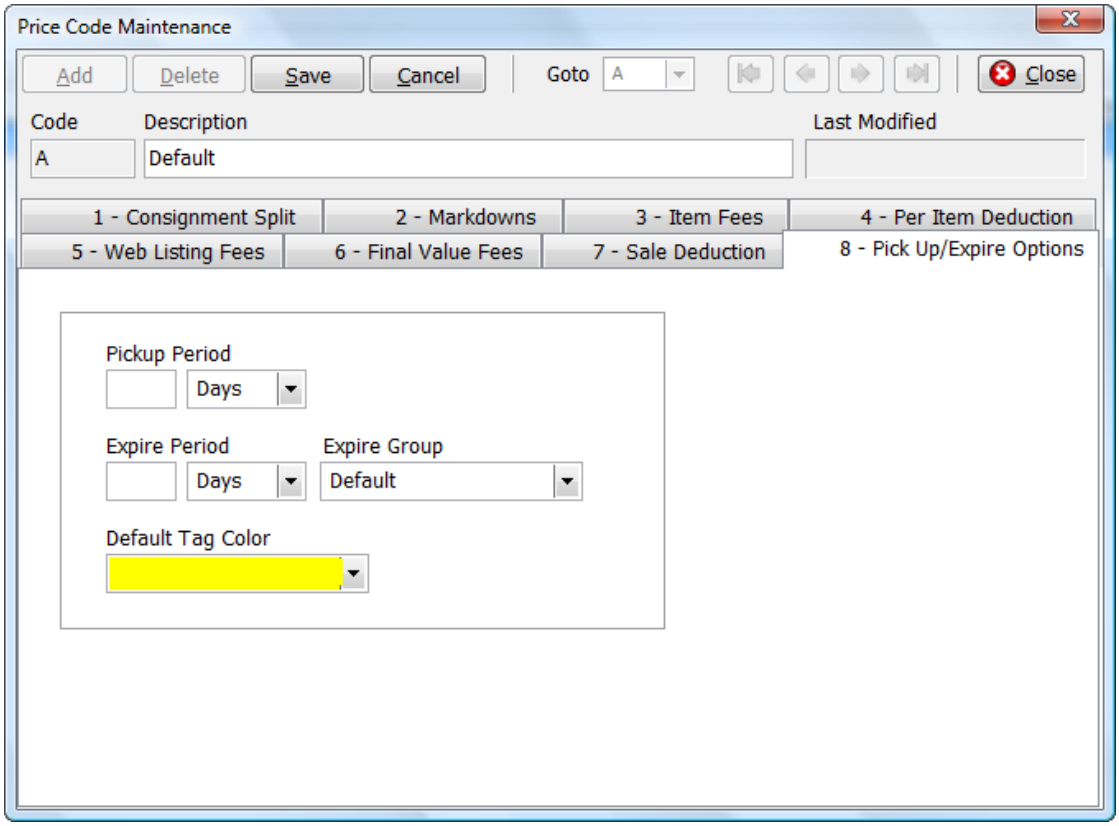
Copyright 2010, Resaleworld.com, Inc.

Codes, is used to set this time period.

When a Pickup Period is established, the date on or after which an item may be picked up if it does not sell is printed on the Item List. The Pickup Date thus informs the client when the consignment period is over for particular items.

To Set the Pickup Period:

1. Select **Tools** → **Price Codes** from the Main Menu. The Price Code dialog will display.
2. Select the **8 – Pickup and Expire Periods** tab.



3. Use the two fields under **Pickup Period** to set the period. Use the drop-down to select the time period you are using (days, weeks, months, or 1st/16th) and then enter the number of the selected time periods in the left field, such as "2" and "Weeks".
4. Select the **Save** button.

Note: *Each Price Code has its own Pickup Period, therefore the Pickup Period must be established for each Price Code in use.*

Copyright 2010, Resaleworld.com, Inc.

Expire Period

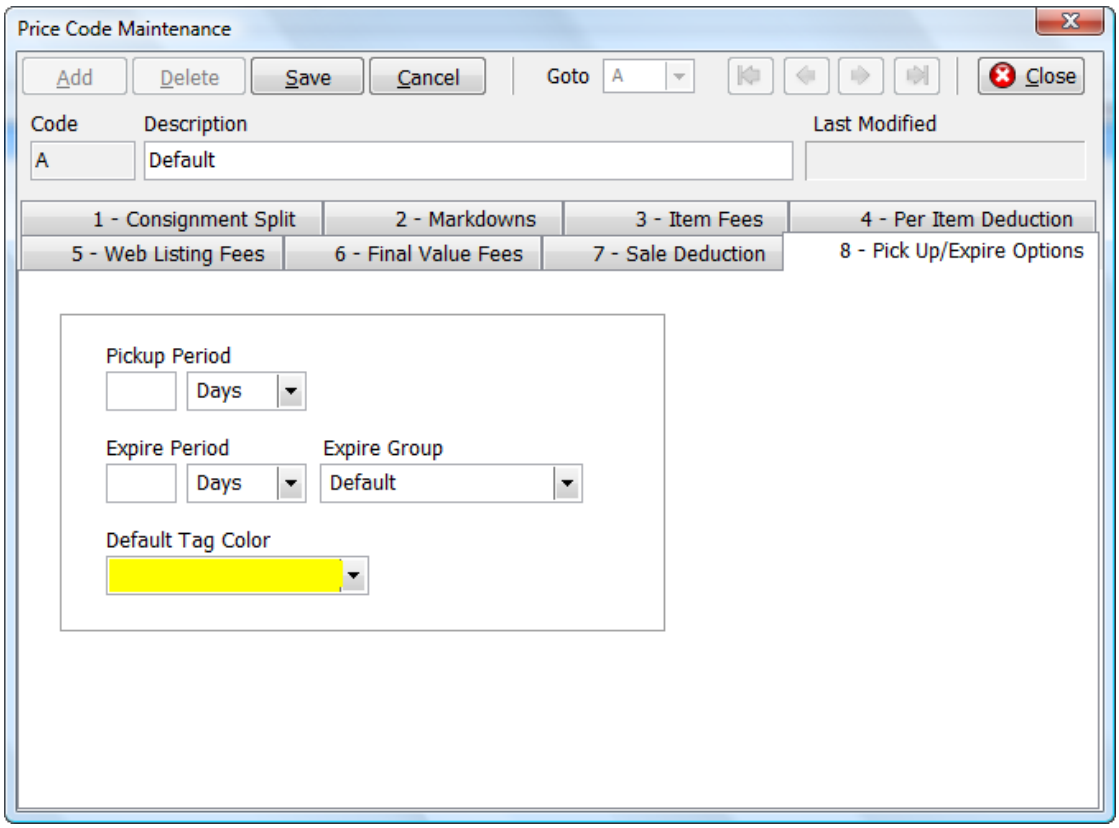
Consigned items may be set to **Expire** after a certain time period. Expire Post is an excellent revenue generating feature which many stores throughout the consignment industry take advantage of.

When a consigned item Is posted as Expired, the proceeds of the sale are **not** split between the store and the consignor. The entire purchase price instead goes to the store. In other words, the cost of the item becomes zero (0), which makes the entire selling price profit.

When Expire Post is enabled, items that sell after the length of time specified in the **Expire period** are posted as **Expired** (not as **Sold**). In this case the Disposition of the item will be listed as **Expired**.

To Set the Expire Period:

1. Select **Tools** → **Price Codes** from the Main Menu. The Price Code dialog will display.
2. Select the **8 – Pickup and Expire Periods** tab.



3. Use the two fields under **Expire Period** to set the expiration. Use the drop-down to select the time period you are using (days, weeks, months, or 1st/16th) and then enter the number of the selected time periods in the left field, such as "4" and "Months".
4. (Optional.) Use the Expire Group field to create a description for the Expired Items.

Copyright 2010, Resaleworld.com, Inc.

Doing so allows reports to be generated on the basis of Expire Groups.

Example: Create an Expire Group with the name Out-of-Season, assign multiple Price Codes to this group, and then track this information in reports.

5. Select the **Save** button.

> ***Note:*** *Each Price Code has its own Pickup Period, therefore the Pickup Period must be established for each Price Code in use.*

Default Tag Color

See the section on Automatic Markdowns for more information.

WEB LISTING FEES

Inventory Module → Tools → Price Codes → 2-Web Listing Fees Tab

Web Listing Fees allow a fee (or fees) to be assessed to items sold online. A Web Listing Fee is different than a Final Value Fee in that the amount of the fee is based on the initial price of the item, not on the final selling price.

> ***Note****: Web Listing Fees may be automatically reversed by using the Sale Deduction tab in the Price Code dialog. See the section entitled Sale Deductions for more details.*

Note each Price Code has its own Web Listing Fee (different Web Listing Fees can be charged with different Price Codes), and that when a Web Listing Fee is assessed the fee is posted to clients' Transaction History.

Listing Fee Options

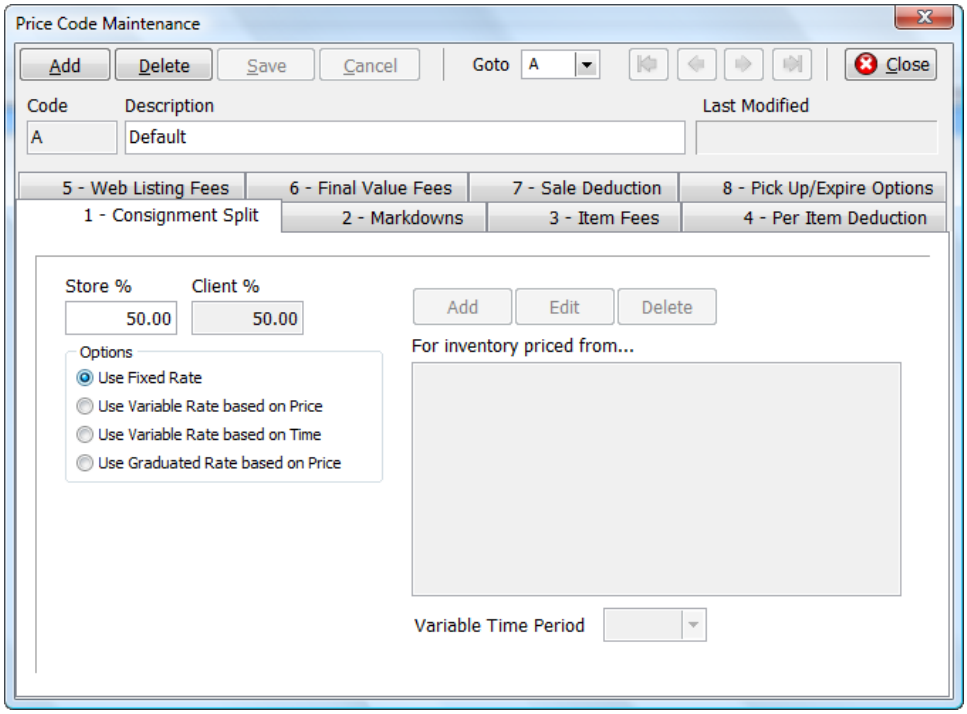
Use Starting Bid as Price	Select whether or not to use the Starting Bid as the Price to be used to calculate the Listing Fee.	
Charge fees when	Item is added to inventory	Self explanatory.
	Item is actually listed to a web site	Self explanatory.
	Recharge Fees when Re-listing	Select whether to or not to charge the Listing Fee again if the item does not sell and is then re-listed for sale using the Re-List Items routine.
	Charge eBay Reserve Fee	Items placed for auction on eBay with a reserve price incur an additional fee. To charge this fee to consignors, check this box. The fee will appear in the consignor's Transaction History as a **Reserve Price Fee**.

Note: *Changes to eBay's Reserve Fee are automatically communicated by eBay to Liberty during the Synchronization process. Therefore there is no need to enter the Reserve Fee into Liberty, as Liberty will automatically assess the current eBay Reserve Fee for you.*

To Implement Web Listing Fees:

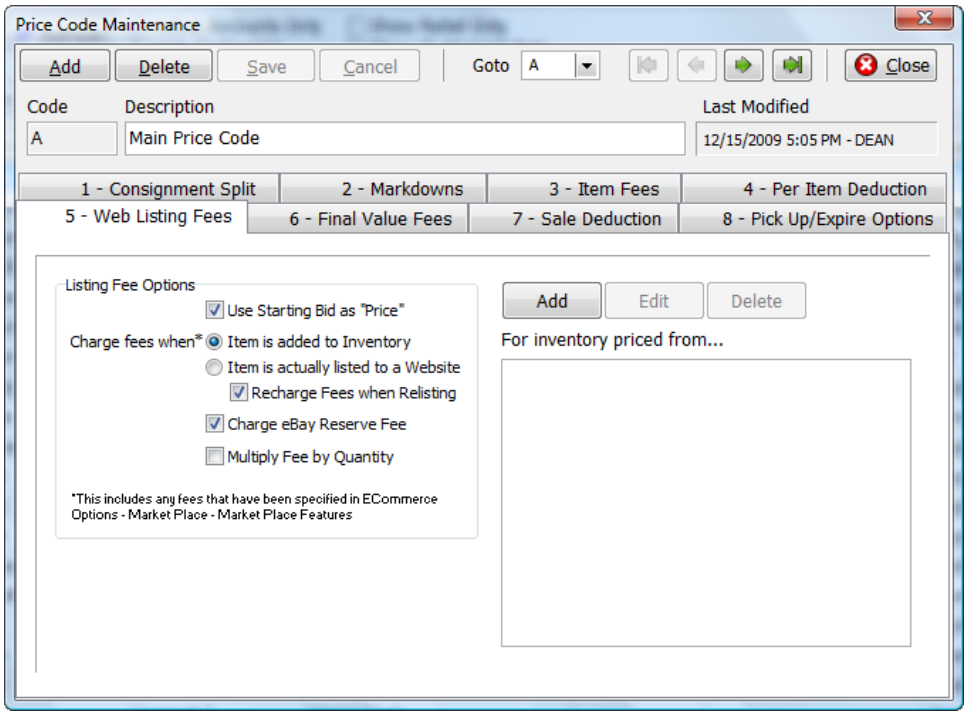
1. Select **Tools** → **Price Codes** from the Main Menu. The Price Code Maintenance dialog will display:

Copyright 2010, Resaleworld.com, Inc.



2. Select the **Price Code** which you wish to implement a **Web Listing Fee** for. Use the Jump buttons to navigate between Price Code letters.

3. Click on the **5. – Web Listing Fees** tab.



4. On the **Listing Fee Options** panel (located in the upper right of the Price Codes dialog):

a. In the **Use Starting Price as Bid** check box, select whether or not to use the Starting Bid as the Price to be used when calculating the Listing Fee.

b. Using the radio buttons next to **Charge fees when** select whether:

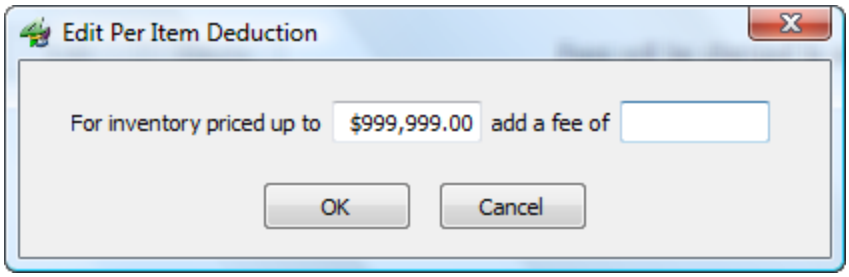
   i. The Listing Fee is charged when the item is added to inventory, or

   ii. The Listing Fee is charged when the item is actually listed to the web site.

   Note that this selection also includes any fees specified under **Tools** → **Ecommerce Options** on the **Marketplace** tab, such as **Boldface Title**, **Buy-It-Now**, **Sub-Title**, etc. Fees charged will appear in the consignor's Transaction History.

c. Using the **Recharge Fees when Re-listing** check box, select whether to or not to charge the Listing Fee again if the item does not sell and is then re-listed for sale using the Re-List Items routine.

5. Click the **Add** button on the **Web Listing Fee** panel. The **Edit Per Item Deduction** dialog will display:



6. Enter the appropriate information in the dialog and click **OK**. If the amount of the fee varies depending on the initial price of the item, repeat this step as needed.

   Example: For a Web Listing Fee of $15.00 for items priced at under $100.00, and a Web Listing Fee of $25.00 for items priced $100.00 and up:

   a. Enter 99.99 and 15.00 in the first dialog that appears, then select **OK**.

   b. Highlight the second entry in the Web Listing panel which says *For inventory priced from $100.00 to 999999.00 charge a $15.00 listing fee*, then select the **Edit** button.

   c. Enter 100.00 in the first field, then select the **OK** button.

7. When finished click on the **Save** button at the top of the Price Code dialog.

Related Topics

Sale Deductions

Final Value Fees

Price Codes Overview

Copyright 2010, Resaleworld.com, Inc.

Re-List Items

View Transaction History

FINAL VALUE FEES

Inventory Module → Tools → Price Codes → 6-Final Value Fees Tab

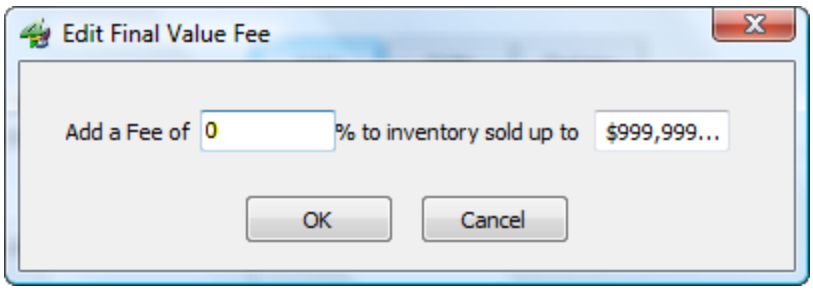
Final Value Fees only apply to items sold online, and are charged on a graduated scale. Final Value Fees are often used to simulate eBay's fees so they may be passed on to consignors, although different schemes may certainly be implemented.

Note that Final Value Fees are based on the actual selling price, are only assessed once an item sells online, appear in the consignor's Transaction History, and that each Price Code has its own Final Value Fee formula (different Final Value Fee schemes can be created for use with different Price Codes).

To Set Final Value Fees for a Particular Price Code:

1. Select **Tools → Price Codes**.
2. Using the **Goto** drop-down or the **Jump** buttons, navigate to the Price Code for which Final Value Fees are to be set up.
3. Select the **6 – Final Value Fees** tab.
4. Select the **Add** button on the **Final Value Fees** panel. The **Edit Final Value Fee** dialog will display:

Copyright 2010, Resaleworld.com, Inc.



5. Enter the appropriate information in the **Edit Final Value Fees** dialog, then click **OK**. If the amount of the fee varies depending on the selling price of the item, repeat this step as needed.

   Example: For a Final Value Fee of 5% of the first $25.00, 2.5% for 25.01 to 100.00, and 1.5% from 100.01 and up:

   a. Enter 5% and $25.00 in the first dialog that appears, then select OK.

   b. Highlight the second entry in the **Final Value Fee** panel which says *For inventory sold from $25.01 to 999999.00 charge a 5% final value fee*, then select the **Edit** button.

   c. Enter 2.5% and $100.00 in the two fields, then select the **OK** button.

   d. Highlight the third entry in the **Final Value Fee** panel which says *For inventory sold from $100.01 to 999999.00 charge a 2.5% final value fee*, then select the **Edit** button.

   e. Enter 1.5% in the first field, then select the **OK** button.

6. Set the **Minimum** and **Maximum Fee** charged in the appropriate fields. The **Minimum Fee** is the lowest fee that will be charged, regardless of selling price and the formula for calculating the fee. The **Maximum Fee** is the greatest fee that will be charged, regardless of selling price and the formula for calculating the fee.

Related Topics

Web Listing Fees

Price Codes Overview

Copyright 2010, Resaleworld.com, Inc.

AUTOMATIC MARKDOWNS OVERVIEW

Tools → *Price Codes*

Most consignment stores reduce the price of items if they do not sell within a certain time frame. Some stores mark items down by hand, others use color coded price tags and require the sales clerk to reduce the selling price at the checkout counter.

Enabling **Automatic Markdowns** eliminates the need for the sales clerk to enter the reduced price for each item when it sells. It also allows Markdown Tags to be printed. These Markdown Tags indicate both the date of the price reduction and the new price. The result of using Automatic Markdowns is that when an item is posted as sold, the sales clerk is not required to change the price by using **Change Post** or **Sale Post**. This can lead to greater accuracy and faster sales transactions.

There are two types of **Automatic Markdowns:**

1. Markdown by Time Period, and
2. Markdown by Tag Color.

> ***Note:*** *Liberty defaults to not using Automatic Markdowns for any Price Codes.*

> ***Note:*** *Different Price Codes may utilize different Automatic Markdown conventions, i.e. some can markdown by time period, others by tag color.*

Related Topics

Set Up Automatic Markdowns by Time Period

Set Up Automatic Markdowns by Tag Color

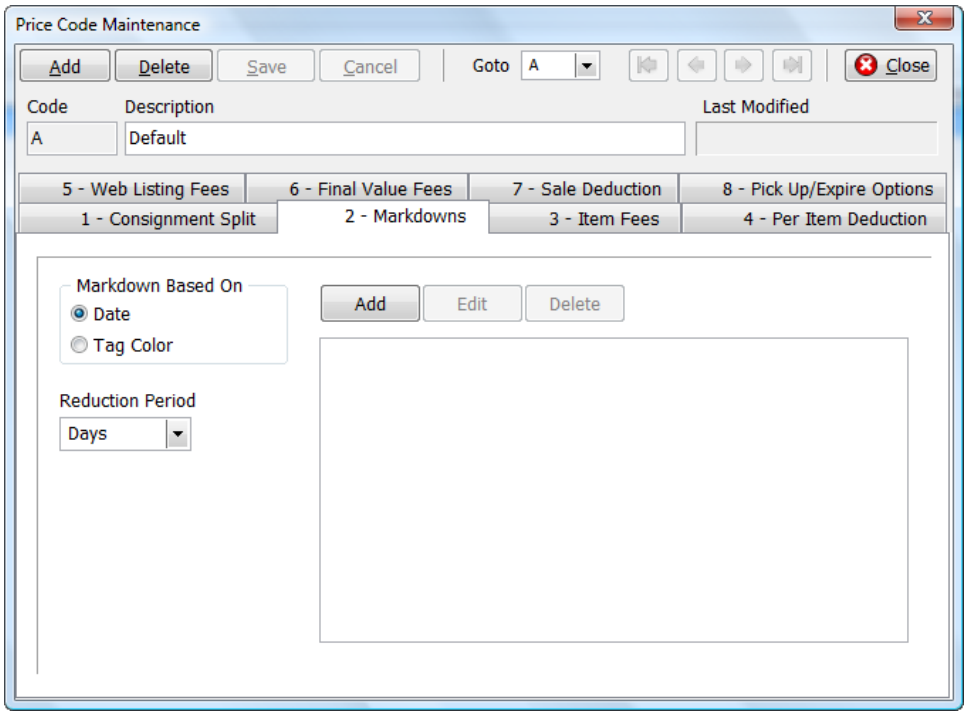
Copyright 2010, Resaleworld.com, Inc.

SET UP AUTOMATIC MARKDOWNS BY TIME PERIOD

Tools → Price Codes → 2-Markdowns Tab

To Implement Automatic Markdowns for a Price Code:

1. Select **Tools → Price Codes** from the Main Menu. The Price Code dialog will display.
2. Select the **Price Code** letter for the **Automatic Markdowns** to affect. Use the **Goto** drop-down or the **Jump** buttons to navigate between Price Code letters.
3. Select the **2 - Markdowns** tab.



4. Make sure that **Markdowns Based on *Date*** is selected.
5. Select the time frame to be used for the Markdowns by choosing either **Days**, **Weeks**,

Months, or **1st/16th** from the Reduction Period drop-down.

6. Select the **Add** button on the **2-Markdowns** tab.
7. Enter the first markdown percentage and markdown time period in the **Edit Markdown** dialog that appears, then click **OK**.
8. Repeat step 7 as many times as needed.
9. When all markdowns and time periods have been entered, click the **Save** button at the top of the window.

Time Periods and Markdowns

You may choose from four time periods when setting **Time Periods** for Markdowns:

- Days
- Weeks
- Months
- 1/16th

Different Price Codes may use different Time Periods. These periods work in the same manner as the **Pickup Date** which is printed on Item Lists. (See the section entitled Define Consignment Splits for more information on Pickup Dates.)

Days

With days, Day 1 is considered the date the item is received. When days are specified, remember that some months have more days than others, therefore, 90 days from May 15th is not August 15th.

Weeks

A week always begins on Sunday. Items received on a Sunday begin their first week that day.

Week number one does not start for items received Monday thru Saturday until the first Sunday following the date the item is received.

Months

A month always begins on the first day of the month. Items received on the first begin their first month that same day. Otherwise month number one will not start until the first day of the following month.

Copyright 2010, Resaleworld.com, Inc.

1st/16th

With 1st/16th the first Half Month begins on the next 1st or next 16th, whichever comes first. An item received on the 1st starts its first half month that same day. The same applies to an item marked as received on the 16th. Otherwise the first **Half Month** period does not begin until either the next 1st day of the month or the next 16th day of the month, whichever occurs first.

Reduction Period Examples

If the preceding information gives you a headache or puts you to sleep, perhaps the following examples will be more helpful.

Date Received	60 Days	4 Weeks	2 Months	2 1/16th
June 1	July 31	June 29	Sept. 1	July 1
June 2	Aug. 1	July 6	Sept. 1	July 16
June 3	Aug. 2	July 6	Sept. 1	July 16
June 15	Aug. 14	July 13	Sept. 1	July 16
June 16	Aug. 15	July 20	Sept. 1	Aug. 1
June 17	Aug. 16	July 20	Sept. 1	Aug. 1

Sample Calendar to Use as Reference for the Time Period Examples Provided Above:

JUNE

Sun	Mon	Tue	Wed	Thur	Fri	Sat
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30					

JULY

Sun	Mon	Tue	Wed	Thur	Fri	Sat
		1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30	31		

AUGUST

Sun	Mon	Tue	Wed	Thur	Fri	Sat
					1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30
31						

SEPTEMBER

Sun	Mon	Tue	Wed	Thur	Fri	Sat
	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30				

Copyright 2010, Resaleworld.com, Inc.

Set Up Automatic Markdowns by Tag Color

Tools → Price Codes → 2-Markdowns Tab

Use **Tag Color Markdowns** when you wish to markdown items based on the color tag they were assigned when added to inventory. To use Tag Color Markdowns a tag color must be assigned to items. The Tag Color field in the Item Entry window serves this purpose. See the section entitled The Item Entry Window for more information.

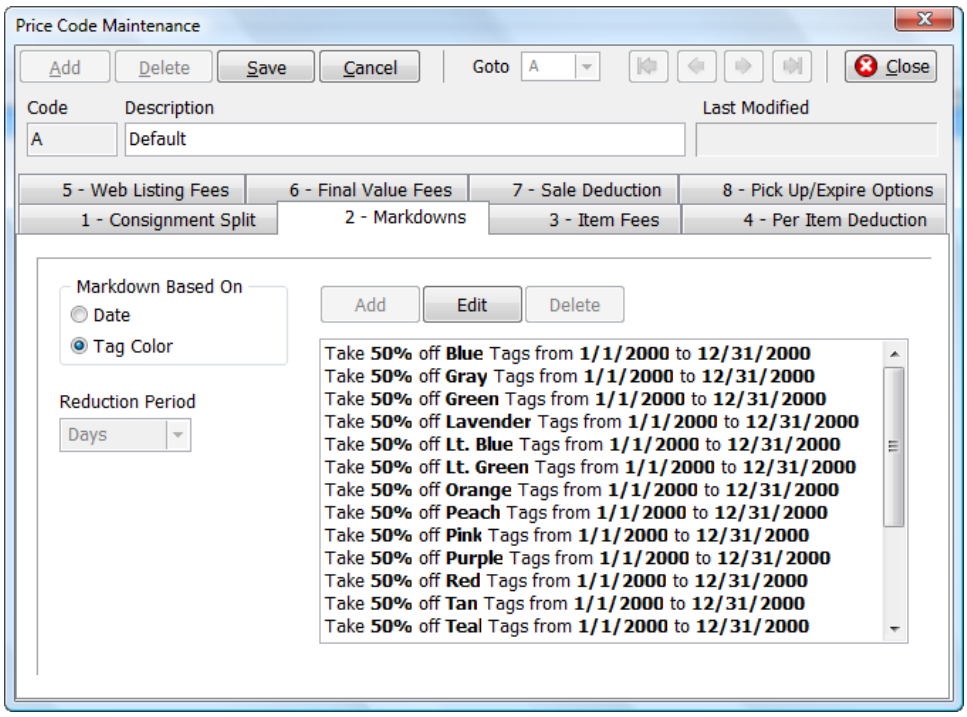
There are some pros and cons to using Tag Color Markdowns. The advantage to marking down inventory by tag color is that this method allows infinite flexibility - you can *go by feel*. You can look at your inventory and at any time, based on your appraisal of the situation, decide when or when not to discount inventory.

On the other hand you have to remember to do it – it's easy to forget to markdown. Using Liberty's Markdowns by Time may be a better option, as it ensures items are marked down automatically and consistently. Perhaps more importantly, when items are marked down inconsistently it becomes impossible to draw accurate conclusions from inventory reports on the relative merits of your markdown strategy and how much it is helping or hurting profitability.

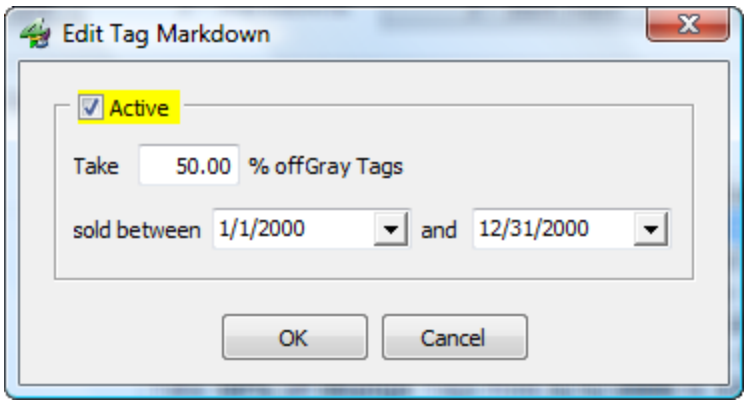
To Set Up Automatic Markdown By Tag Colors For A Price Code:

1. Select **Tools → Price Codes** from the Main Menu. The Price Code dialog will display.
2. Select the **Price Code** letter for the **Automatic Markdowns** to affect. Use the **Goto** drop-down or the **Jump** buttons to navigate between Price Code letters.
3. Select the **2-Markdowns** tab.
4. Select **Markdowns Based on *Tag Color***.

Copyright 2010, Resaleworld.com, Inc.

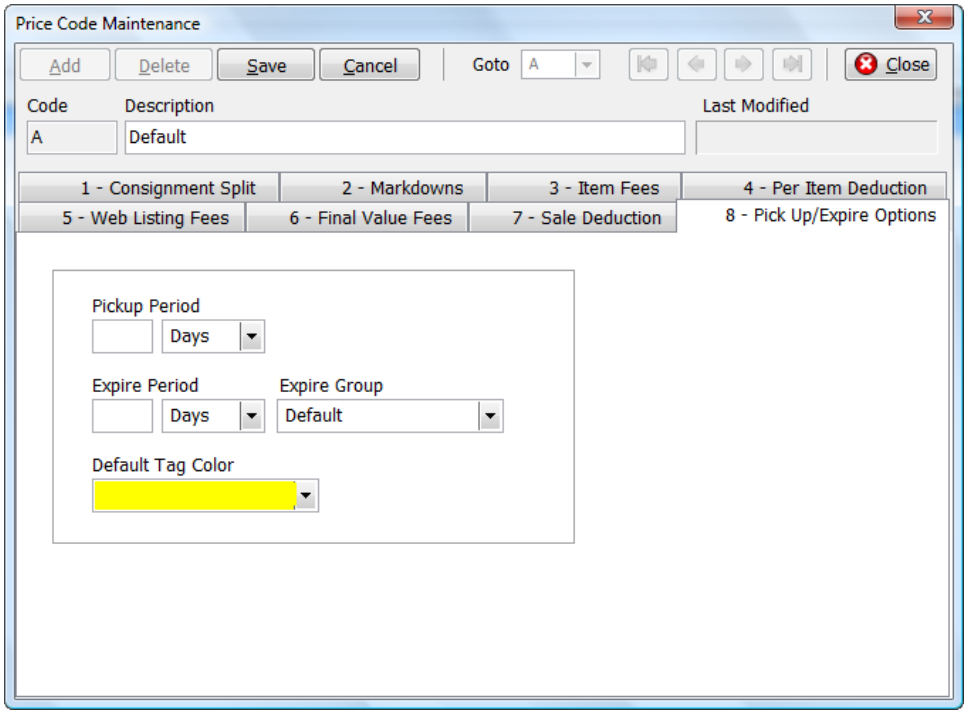

Price Code Maintenance
Add
Delete
Save
Cancel
Goto
A
Close
Code
Description
Last Modified
A
Default
5 - Web Listing Fees
6 - Final Value Fees
7 - Sale Deduction
8 - Pick Up/Expire Options
1 - Consignment Split
2 - Markdowns
3 - Item Fees
4 - Per Item Deduction
Markdown Based On
Date
Tag Color
Reduction Period
Days
Add
Edit
Delete
Take 50% off Blue Tags from 1/1/2000 to 12/31/2000
Take 50% off Gray Tags from 1/1/2000 to 12/31/2000
Take 50% off Green Tags from 1/1/2000 to 12/31/2000
Take 50% off Lavender Tags from 1/1/2000 to 12/31/2000
Take 50% off Lt. Blue Tags from 1/1/2000 to 12/31/2000
Take 50% off Lt. Green Tags from 1/1/2000 to 12/31/2000
Take 50% off Orange Tags from 1/1/2000 to 12/31/2000
Take 50% off Peach Tags from 1/1/2000 to 12/31/2000
Take 50% off Pink Tags from 1/1/2000 to 12/31/2000
Take 50% off Purple Tags from 1/1/2000 to 12/31/2000
Take 50% off Red Tags from 1/1/2000 to 12/31/2000
Take 50% off Tan Tags from 1/1/2000 to 12/31/2000
Take 50% off Teal Tags from 1/1/2000 to 12/31/2000

5. Highlight the color tag you wish to change and select the **Edit** button. The **Edit Tag Markdown** dialog will display.



6. Put a check in the **Active** check box to make the color an Active color. When a color is Active then a discount percentage and time period may be assigned to it. When a color is Not Active then that color will not be discounted.
7. Enter the percentage to reduce items by in the **Take XX% off {Color} Tags** field.
8. Enter the appropriate dates in the two date fields.
9. Click the **OK** button when finished.
10. Repeat for all colors. Be sure to deactivate those colors not in use.
11. When all markdowns and time periods have been entered, click the **Save** button at the very top of the **Price Code Maintenance** dialog.
12. Select the **8-Pick Up/Expire Options** tab.

Copyright 2010, Resaleworld.com, Inc.



13. Select a **Default Tag Color** from the drop-down.
14. Click **Save**.

Related Topics

Automatic Markdowns Overview

Set Up Automatic Markdowns by Time Period

About Item Fees

An **Item Fee** is an amount added to the price of a consigned item that appears only on the price tag, and not on clients' item lists.

Example: With an Item Fee of $1.00, an item originally priced at $20.00 will show $20.00 as the original asking price when a consignor's Item List is printed, and throughout the system. The actual selling amount of $21.00 will only appear on the price tag and at the Point of Sale.

Copyright 2010, Resaleworld.com, Inc.

Item Fees are not affected by the consignment split: thus the store keeps 100% of the Item Fee and the consignor receives 0%. Item Fees are set in Price Codes, and every Price Code can have its own Item Fee.

Example: Price Code A could have no Item Fee, and Price Code B could have an Item Fee of $1 for items priced from $10 - $25, and $2 for items priced over $25.

When items are posted in Point of Sale, the Item Fee **is** included in the sale amounts displayed on screen. Since the user is referring to the information displayed on screen to know how much the customer owes, the information must match that found on the price tags. More information on this option can be found in the section entitled Item Fees.

Some stores consider the idea of assessing an extra fee to be an excellent idea. Other stores find nothing beneficial in using an Item Fee and would not wish to implement it under any circumstances. Since a significant percentage of stores find the Item Fee to be an attractive feature, it has been included in this program. There are pros and cons to using an Item Fee, as well as some recommended **Do's** and **Don'ts**.

The benefit to using an Item Fee is the added revenue the fee will generate. For instance, a store which sells 10,000 items per year stands to increase revenues $5,000 by imposing a 50 cent Item Fee. Figure the amount of increase in your store's revenues based upon a realistic Item Fee amount, and you will no doubt discover there is potentially a large amount of money to be made by implementing a fee. In addition, since there is no cost to this increased revenue, it represents the same amount of increase on the bottom line.

Detractors to the use of an Item Fee point out that it is important not to alienate consignors, since they are the life-blood of the consignment business. This is an important point, however, different stores are able to work with their consignors in different ways. Only the store owner can judge his or her own situation by evaluating the type of relationship maintained with the consignors. If you decide to implement an item fee, consider the following:

1. Be honest about the existence of the Item Fee. You need not advertise that an Item Fee is part of the price, however, don't try to evade the truth.
2. Include the fact that an Item Fee is assessed in the consignment contract.
3. Don't make the amount of the fee so high as to be excessive.
4. Don't expect the Item Fee to solve all your financial problems.
5. Be sure to have several reasons to justify the Item Fee when queried. Among the justifications heard (some would call them rationalizations...) are *To help cover overhead (or rent, or supplies, etc.)*, *Other stores charge a higher consignment fee (percentage split)*, and *We don't make any money on items that don't sell and end up being returned to the consignor after having taken up floor space for (3 months)*. Children's stores might consider *The average price per item is so low that an Item Fee is necessary to insure the store earns a certain, base amount per item in order to stay in business*.

Copyright 2010, Resaleworld.com, Inc.

There are any number of valid reasons which may be formulated in favor of using an Item Fee. The examples given above are to help you consider and choose some responses in advance of being asked the question. This is important, because there is nothing worse than having no answer for a potential or current client.

Related Topics

Set Up Item Fees

Price Codes Overview

Options for Handling Item Fees at the Point of Sale

SET UP ITEM FEES

An **Item Fee** is an amount added to the price of an item that appears only on the price tag, and not on consignor's items files. The store keeps 100% of the Item Fee and the consignor receives 0%. Item Fees are attached to Price Codes: thus every Price Code can have its own Item Fee.

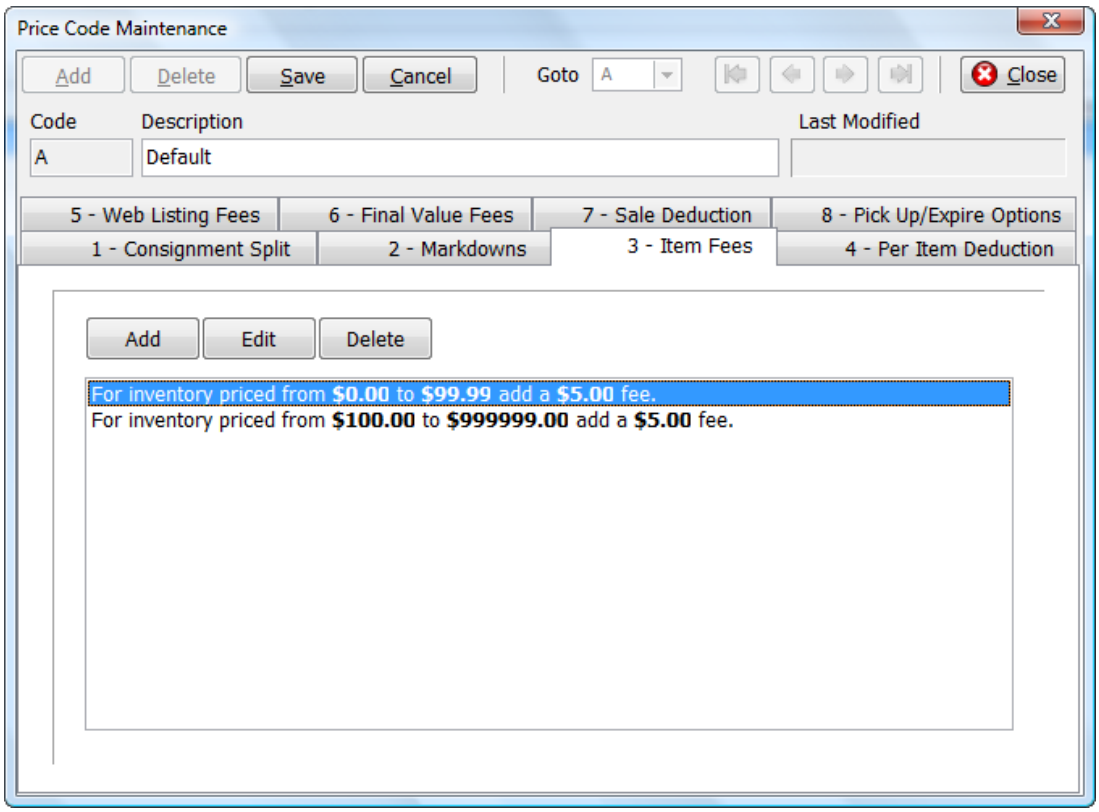
Example: Price Code A could have no Item Fee, and Price Code B could have an Item Fee of $1 for items priced from $10 - $25, and $2 for items priced over $25.

Different **Price Codes** may use different Item Fees.

To Implement Item Fees For A Price Code:

1. Select **Tools** → **Price Codes** from the Main Menu. The Price Code dialog will appear.
2. Select the **Price Code** to which an Item Fee is to be assigned. Use the Jump buttons to navigate between Price Code letters.
3. Select the **3 - Item Fees** tab.

Copyright 2010, Resaleworld.com, Inc.



4. Click the **Add** button.
5. Enter the appropriate information in the **Edit Item Fee** dialog that appears.
6. Click **OK**.
7. Add additional Item Fee parameters in the Edit Item Fee dialog by selecting the **Edit** and **Add** buttons as necessary. (Often the Edit button is used instead of Add.)
8. When finished click on the **Save** button at the top of the Price Code window.

Item Fee Calculations for Items Sold at a Discount

When items are posted in Point of Sale, the Item Fee **is** included in the sale amounts displayed on screen. Since the user is referring to the PoS Display to know how much the customer owes the information must match that found on the price tags.

> ***Note**: When an item with an Item Fee is sold using Change Post the item fee **IS NOT** reduced.*

Example: A $10.00 item has a $1.00 item fee. Total price for the item is $11.00. The split is 50/50.

Copyright 2010, Resaleworld.com, Inc.

Using **Change Post** the price of the item is changed to $7.00 (selecting **No** in answer to the question Calculate Consignor Net on Original Price?). The consignor receives $7.00 - $1.00 item fee = $6.00 x 50% (split) = $3.00. The amount of the item fee kept by the store stays at $1.00.

> ***Note**: When an item with an Item Fee is sold using Sale Post, the item fee **IS** reduced by the sale percentage.*

Example: A $10.00 item has a $1.00 item fee. Total price for the item is $11.00. The split is 50/50.

Using **Sale Post** the price of the item is reduced 10% to $9.90. The consignor receives $$9.90 - ($1.00 x 90%) = $9.00 x 50% (split) = $4.50. The amount of the item fee kept by the store is .90 (10% off of $1.00).

Related Topics

About Item Fees

Options for Handling Item Fees at the Point of Sale

Overview of Categories, Tax Codes, and Product Lines

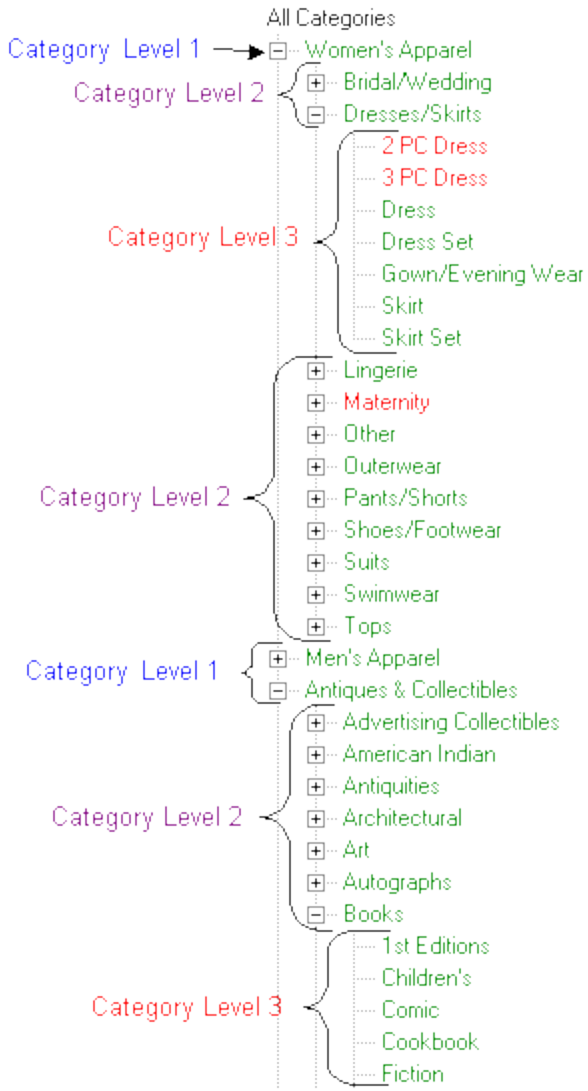
Categories are central to entering inventory into Liberty. The Category field is used to group items into types. Doing so improves the efficiency of using Liberty, significantly increases the speed of inventory entry, and dramatically improves the usefulness of inventory reports.

At this point, you may ask, "How does using Categories improve efficiency and speed?" As you read on, you will see Categories do not stand alone. Liberty integrates Categories with other necessary information, including **Tax Codes, Product Lines,** and **Attributes**. In so doing, several steps are eliminated when items are entered into inventory, and inventory reports become much more useful due to the consistency enforced by this approach to entering information into the system.

Copyright 2010, Resaleworld.com, Inc.

Properly used, **Categories** are a powerful tool and well worth understanding fully. Use them to customize your item entry process and you will gain tremendous speed, power, and efficiency. You will benefit from the ability to generate inventory and sales reports, wish list matches, and lost tag matches in such a way as to dramatically increase the quality of the information at your fingertips. *With this power you can simultaneously increase profits and save time.*

For example, Boots, Pumps, and Loafers are all types of footwear. They are grouped under the Category *Shoes/Footwear*, which is itself a subcategory of Women's Apparel, along with Dresses, Pants, etc. As already mentioned there are many advantages to this approach. The following diagram shows graphically how Categories can relate to one another.

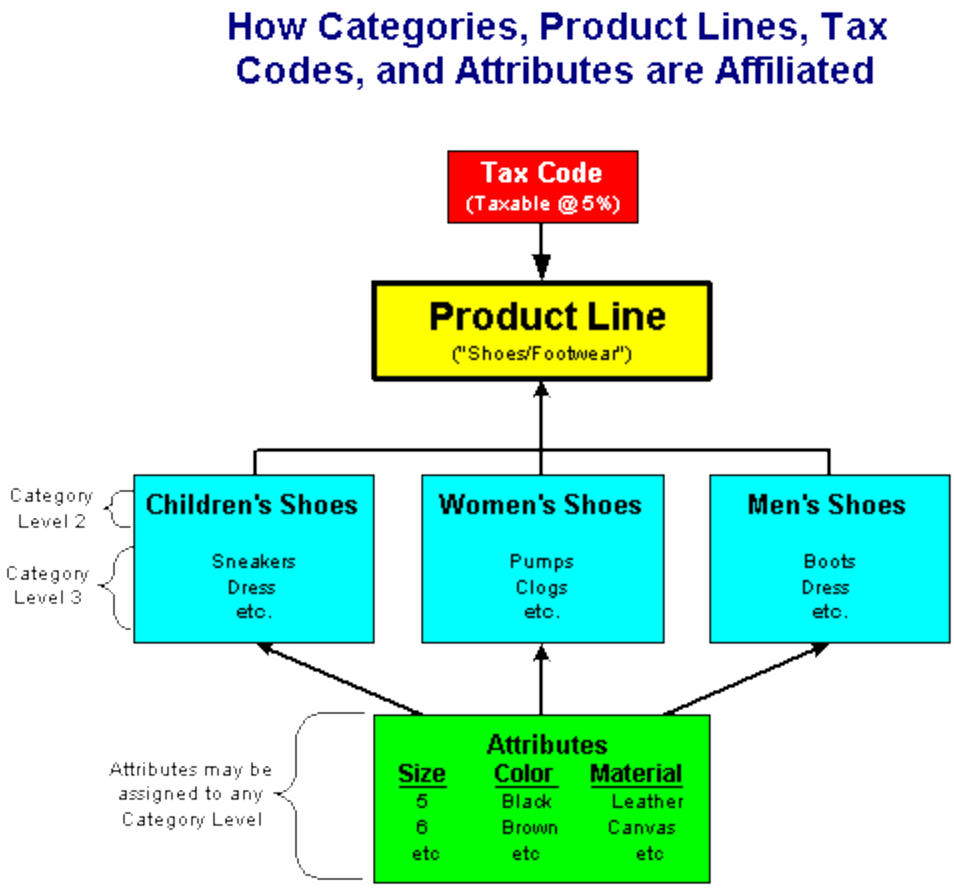


Each Category is assigned a **Product Line**, and each Product Line has a **Tax Code** assigned to it. This makes inventory entry more efficient, because when the item is assigned a Category it gets its Tax Code at the same time, combining two steps into one.

Copyright 2010, Resaleworld.com, Inc.

Each Category may also have one or more **Attributes** assigned to it. An Attribute is a characteristic which helps describe inventory items. For instance, *color* and *fabric* help describe clothing, *material* and *era* help identify antiques.

The following chart shows how Categories, Tax Codes, Product Lines (and Attributes) are associated:



While attribute information may be entered into the Description field, there are significant benefits to entering this information instead by using Attributes. The most important reason is **consistent data entry**.

Consistent data entry makes reports more effective, particularly the Wish List, Lost Tag, Sales and Inventory reports. The more precise the information entered, the easier it is to analyze reports and manage business in general.

Managing Categories is accomplished using the **Category Editor**. The Category Editor assigns Tax Codes and Attributes to Categories. It is also used to add, edit and delete Categories, and turn Categories on and off.

Utilizing the power underlying the use of Categories does take a little time and effort. We guarantee you will agree this time to have been very well spent!

Copyright 2010, Resaleworld.com, Inc.

To Set Up Categories, Do The Following Steps In Order:

1. Set Up Tax Codes.
2. Set Up Product Lines.
3. Set Up Categories.
4. Assign Product Lines to Categories.
5. Associate Attributes to Categories.
6. (Optional) Establish prices using the Pricing Guide.

Related Topics

Tax Code Set Up Overview

Set Up Product Lines

The Category Editor

TAX CODE SET UP OVERVIEW

Inventory Module ➔ *Tools* ➔ *Tax Codes*

Before adding or changing any **Tax Codes**, we recommend reading entirely through all the sections on Tax Codes (this Overview, Tax Code Setup, and Adding a Tax Code) as well as all sections on **Product Lines** (Overview of Product Lines, Set up Product Lines, and Grouping Categories Into Product Lines).

To understand why Tax Codes are integrated with Product Lines and Categories, it helps to understand three things:

1. All inventory items must be assigned a **Category**. Examples of Categories include blouse, dress, table, sofa, etc.
2. Every Category is in turn assigned a **Product Line** for reporting purposes. Categories

Copyright 2010, Resaleworld.com, Inc.

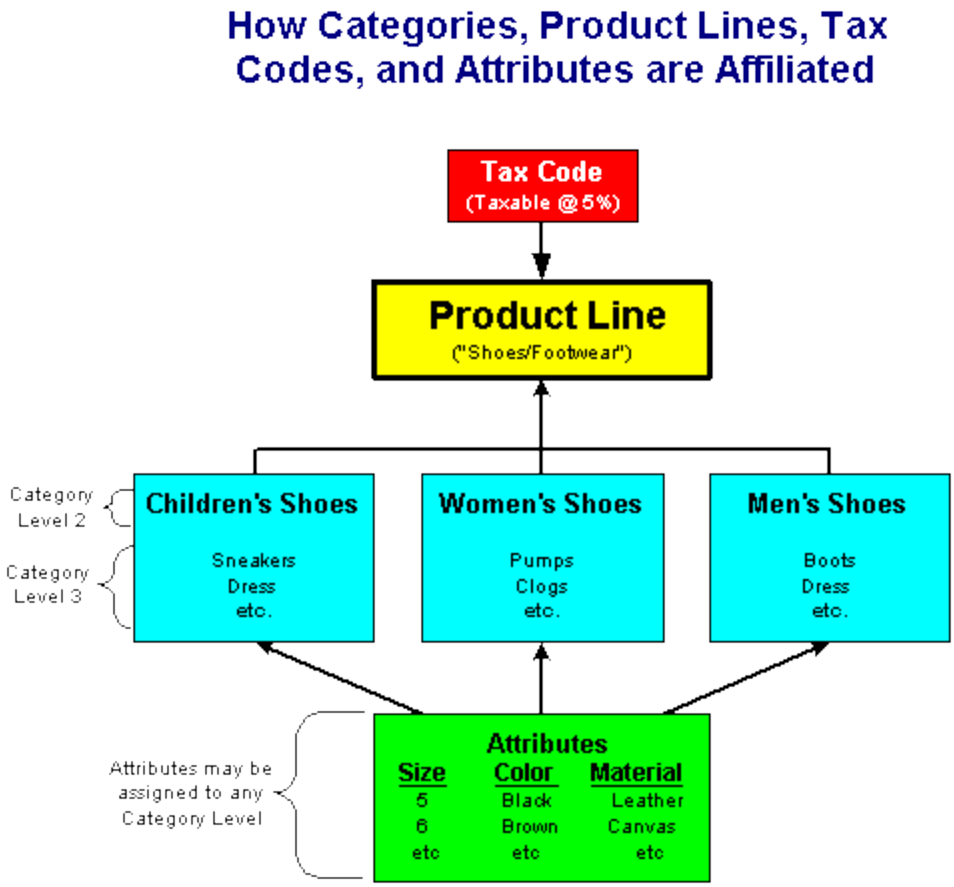
only have to be assigned a Product Line once during setup.

3. Each Product Line in turn is assigned a **Tax Code** (or **Tax Code** – they are one and the same). Product Lines likewise only have to be assigned a Tax Code once during setup.

The reason for the three points above is simple: *assigning a Tax Code via the Product Line to every Category assures the correct tax is always charged*.

In addition, linking taxes and Categories speeds item entry. Again, the reason is simple: *by affiliating Tax Codes and Categories the need to enter the tax rate every time an item is added to inventory is eliminated.*

The following chart shows how Categories, Tax Codes, Product Lines (and Attributes) are associated:



Once you have read all of the sections listed in the first paragraph above, in order perform the following steps:

1. Set Up Tax Codes.
2. Set Up Product Lines.
3. Set Up Categories.

Copyright 2010, Resaleworld.com, Inc.

4. Assign Product Lines to Categories.
5. Associate Attributes to Categories.
6. (Optional) Establish prices using the Pricing Guide.

Related Topics

Set Up Product Lines

Categories Overview

The Category Editor

SET UP TAX CODES

Inventory Module → *Tools* → *Tax Codes*

Important: Read and understand this entire section before making any changes. To help you understand and visualize this process, an example of this process and a flow chart are provided at the end of this section.

Setting up **Tax Codes** is the first step in the process of setting up Categories. To review, there are 5 steps to setting up **Categories**, of which this is the first. In order, the steps are:

1. Set Up Tax Codes.
2. Set Up Product Lines.
3. Set Up Categories.
4. Assign Product Lines to Categories.
5. Set Up and Associate Attributes to Categories.

Once you have set up Tax Codes, proceed to the second step, which is to set up **Product Lines**. Do not set up Product Lines before setting up Tax Codes.

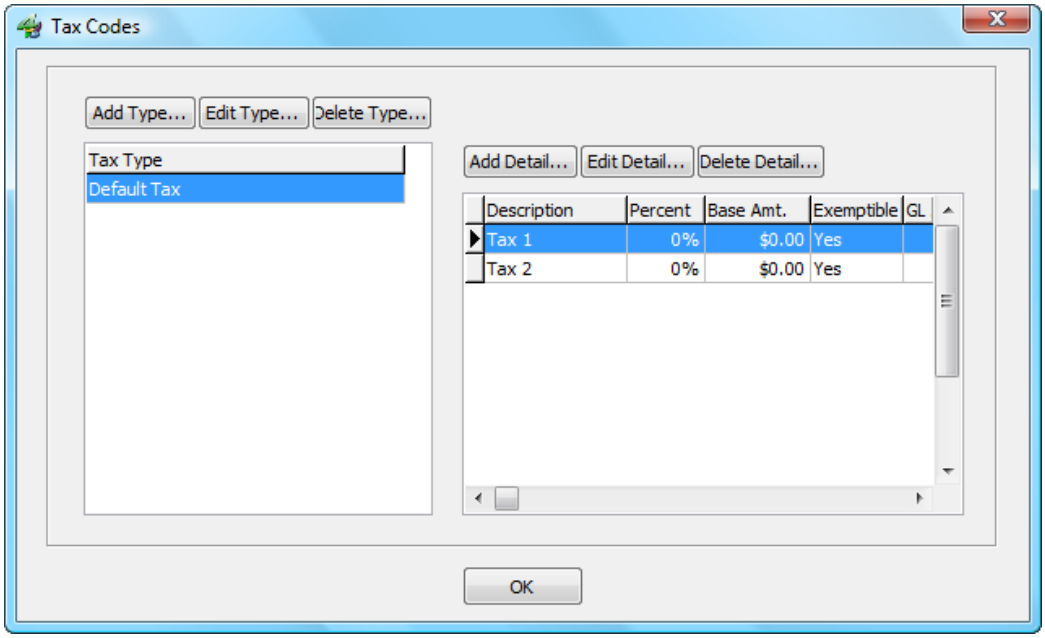
When Liberty is installed, there is one Tax Code. The name for this Tax Code is **Default**. Unfortunately tax rates and laws vary widely from locale to locale, so it is up to you to tell Liberty what to tax, what not to tax, and how much to tax.

Copyright 2010, Resaleworld.com, Inc.

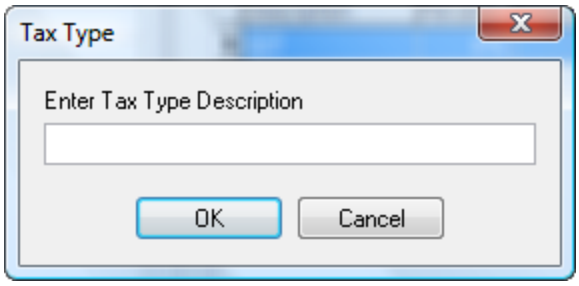
To set up Tax Codes, start by answering this question: **Are most items sold Taxable or Non-Taxable?** If most items are taxable, follow the first set of instructions for If Most Items are Taxable, below. If most items are not taxable, skip over the section entitled ***If Most Items are Taxable*** and follow the instructions given afterward under the heading If Most Items are Non-Taxable.

If Most Items are Taxable:

1. Select **Tools** → **Tax Codes**. The **Tax Codes** dialog will display:

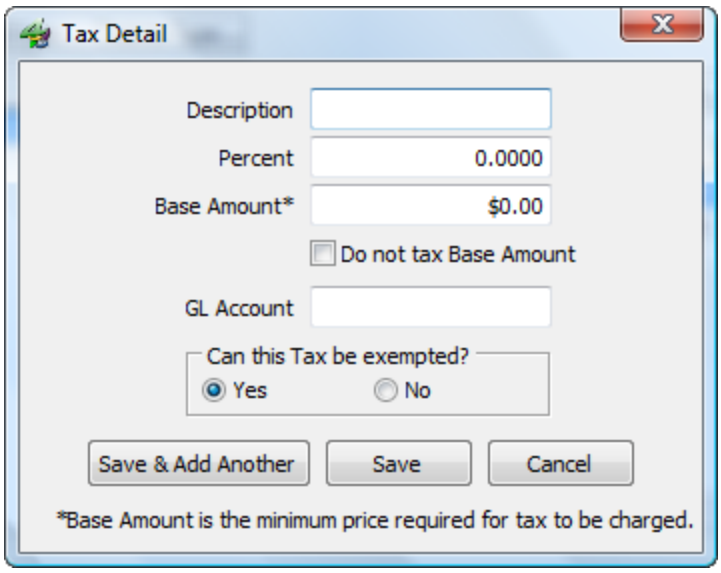


2. Note that Default Tax is the only Tax Type displayed. Select the **Edit Type** button (on the left half of the dialog). The **Tax Type** dialog will appear:



3. Change the name of the **Tax Type** from **Default** to ***Taxable,*** then click **OK**.

4. On the right side of the **Tax Code** dialog, click on the Tax 1 line to highlight it, then select the **Edit Detail** button. The **Tax Detail** dialog will display:



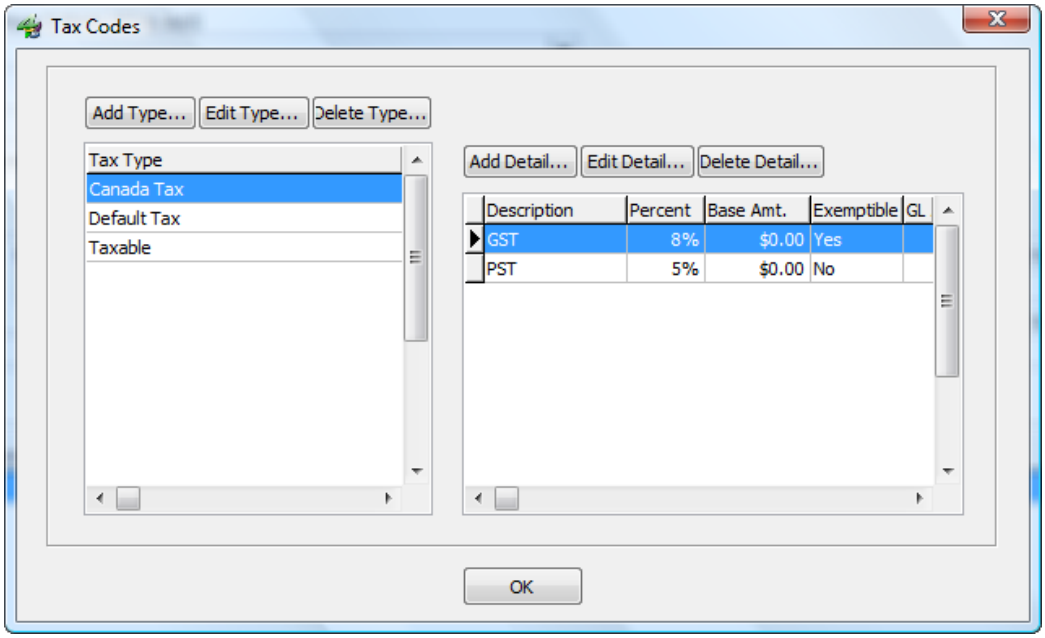
5. Enter a description for the type of tax in the **Description** field. For instance, enter **State Tax**. Press the **<Tab>** key to advance to the next field.
6. Enter the tax percentage in the **Percent** field. Press the **<Tab>** key to advance to the next field.
7. If the tax does not take affect until a certain minimum dollar amount threshold is reached, enter the minimum amount necessary for the tax to take affect in the **Base Amount** field. Press the **<Tab>** key to advance to the next field.

   Example: Your State or Locality does not tax certain items under $75. By placing $75.00 in the Base Amount field, no tax will be assessed unless the item sells for more than $75.00.
8. Select the **Do not tax Base Amount** check box to not tax the amount in the Base Amount field.
9. If you are using accounting software with Liberty, enter the appropriate General Ledger (GL) account number in the **GL Account** field.
10. If the tax can be exempted (which most can), select the **Yes** radio button in the **Exemptible** field. If the tax cannot be exempted, select **No**.
11. Click the **Save** or the **Save and Add Another** button. Generally you will select **Save**.

Note: *In localities with more than one tax, enter additional Tax Detail lines as necessary. For instance, in areas where there is a Local Tax and a State Tax, you would have two Tax Detail lines. Another example would be in Canada, the PST tax is mandatory for all items, whereas the GST tax is not mandatory for all items. To put a tax in to handle this situation, it is necessary to add two Tax*

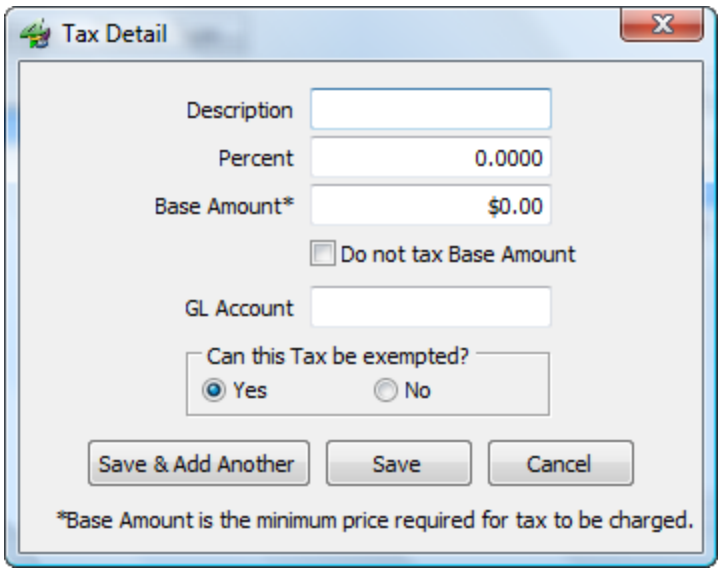
Copyright 2010, Resaleworld.com, Inc.

Detail lines, and to make the GST exemptible whereas the PST would be not exemptible. See the following figure for an example:



12. Add a second **Tax Type** with the name **Non-Taxable**, and its tax rate set to 0%. To do this, click the **Add Type** button, located at the upper left of the dialog.

13. Enter a **Description** for the **Tax Code** (i.e. Non-Taxable) and click **OK**. The **Tax Detail** dialog will display:

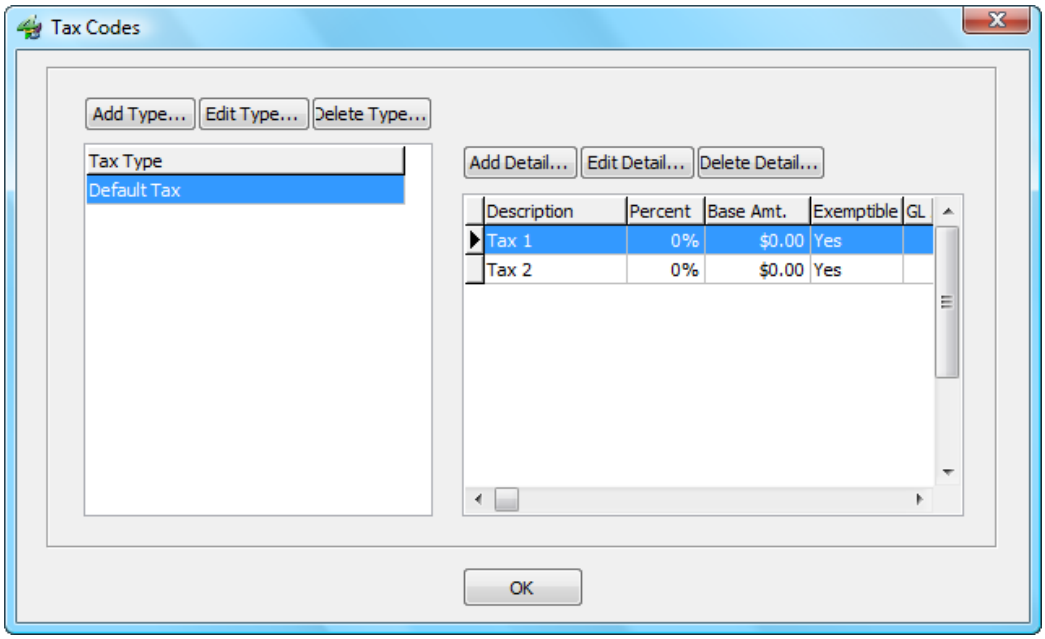


14. Click in the **Percent** field and enter **0.00**.

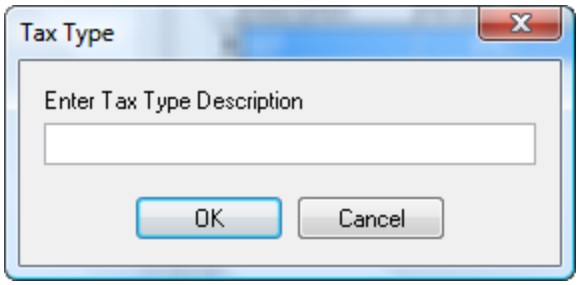
15. Click the **Save** button.

If Most Items are Non-Taxable:

1. Select **Tools** → **Tax Codes**. The **Tax Codes** dialog will display:

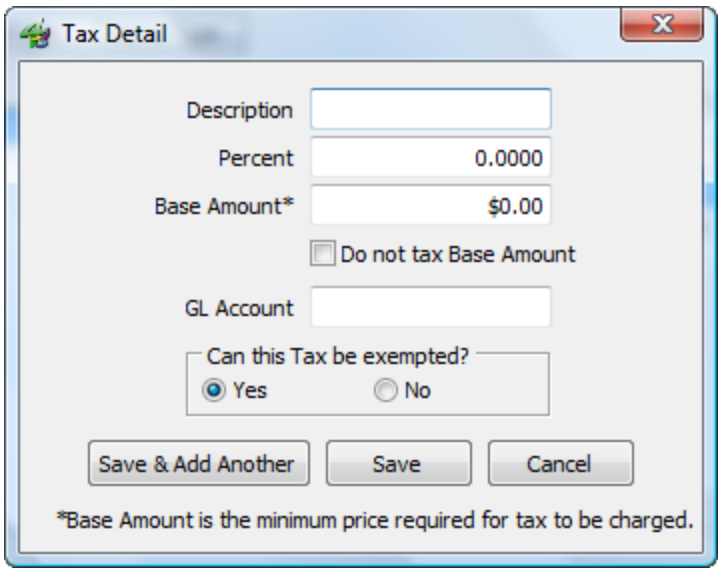


2. Note that Default Tax is the only Tax Type displayed. Select the **Edit Type** button (on the left half of the dialog). The **Tax Type** dialog will appear:

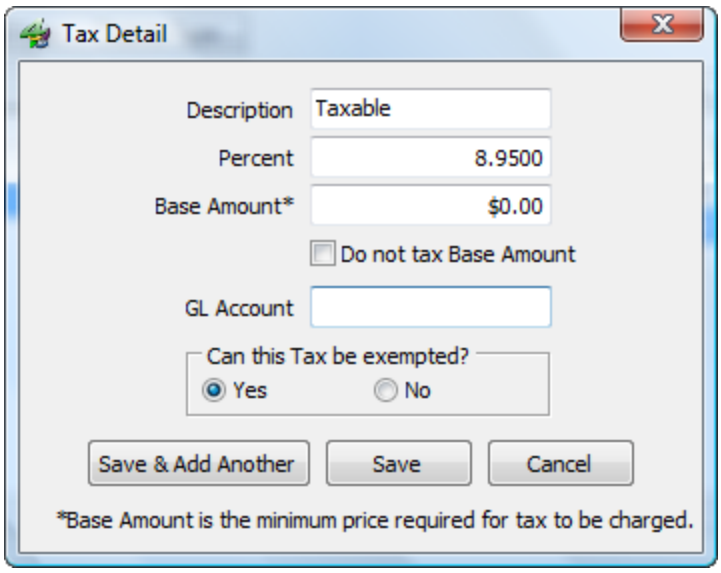


3. Change the name of the **Tax Type** from **Default** to *Non Taxable,* then click **OK**.
4. On the right side of the **Tax Code** dialog, click on the Tax 1 line to highlight it, then select the **Edit Detail** button. The **Tax Detail** dialog will appear:

Copyright 2010, Resaleworld.com, Inc.



5. Verify that the tax rate percentage is 0.0000, then click the **Save** button.
6. Add a new Tax Code with the name **Taxable**. To do this, click the **Add Type** button, located at the upper left of the **Tax Code** dialog.
7. Enter a **Description** (i.e. ***Taxable***) for the **Tax Code** and click **OK**. The **Tax Detail** dialog will appear:



8. Enter a description for the type of tax in the **Description** field. For instance, enter **State Tax**. Press the **<Tab>** key to advance to the next field.
9. Enter the tax percentage in the **Percent** field. Press the **<Tab>** key to advance to the next field.
10. If the tax does not take affect until a certain minimum dollar amount threshold is reached,

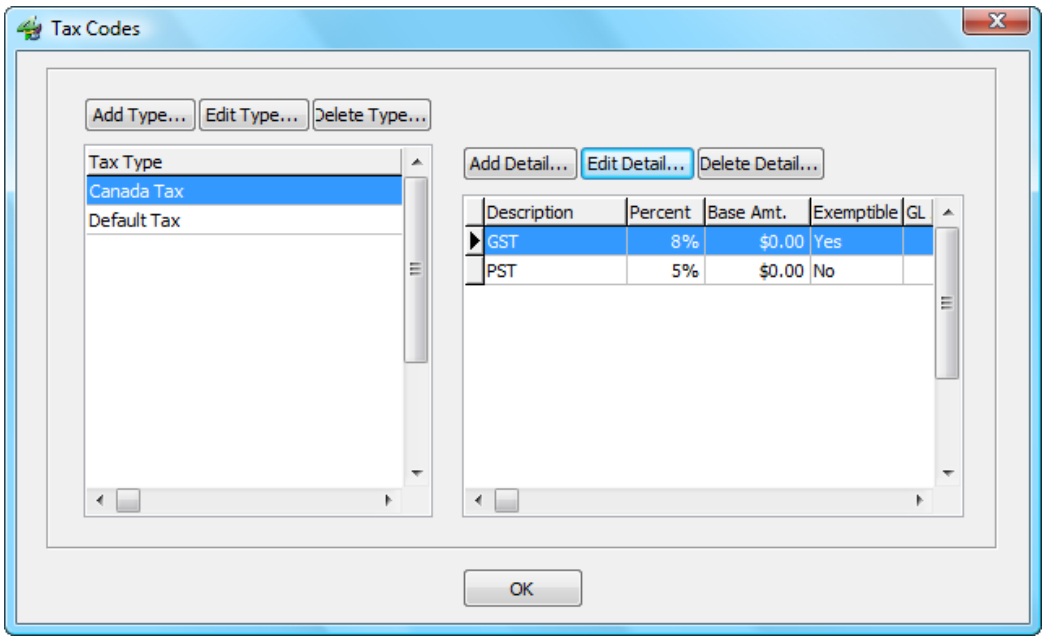
Copyright 2010, Resaleworld.com, Inc.

enter the minimum amount necessary for the tax to take affect in the **Base Amount** field. Press the **<Tab>** key to advance to the next field.

Example: Your State or Locality does not tax certain items under $75. By placing $75.00 in the Base Amount field, no tax will be assessed unless the item sells for more than $75.00.

11. If you are using accounting software with Liberty, enter the appropriate General Ledger (GL) account number in the **GL Account** field.
12. If the tax can be exempted (which most can), select the **Yes** radio button in the **Exemptible** field. If the tax cannot be exempted, select **No**.
13. Click the **Save** or the **Save and Add Another** button. Generally you will select **Save**.

Note: *In localities with more than one tax, enter additional Tax Detail lines as necessary. For instance, in areas where there is a Local Tax and a State Tax, you would have two Tax Detail lines. Another example would be in Canada, the PST tax is mandatory for all items, whereas the GST tax is not mandatory for all items. To put a tax in to handle this situation, it is necessary to add two Tax Detail lines, and to make the GST exemptible whereas the PST would be not exemptible. See the following figure for an example:*



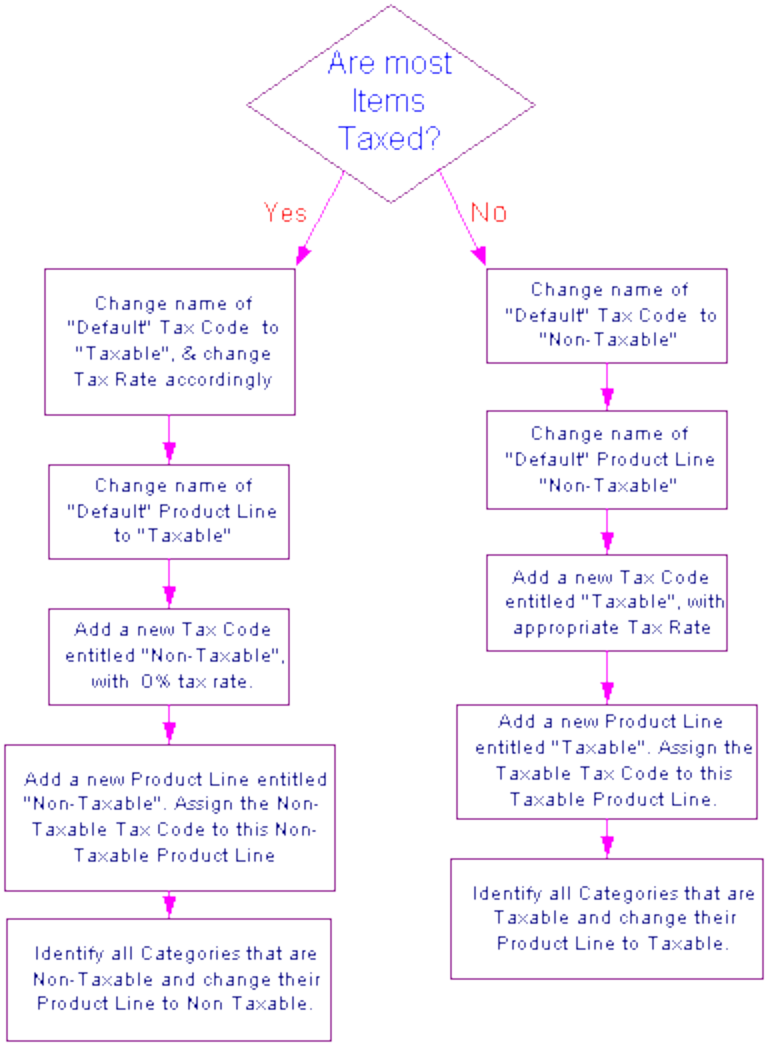
Example

Example: Liberty is installed in a locale where most items are taxed at 5%. Setting the Default Tax Code to 5% assigns every Product Line the 5% Tax (because every Product Line is preset to the Tax Code entitled ***Default***. Setting every Product Line to 5% in turn assigns every Category the 5% tax (because every Category is preset to the Product Line entitled ***Default***).

Copyright 2010, Resaleworld.com, Inc.

For those Categories that are Non-Taxable, create a second Tax Code titled Non-Taxable. Create a Product Line named Non-Taxable, and assign the Non-Taxable Tax Code to it Finally, assign this Non-Taxable Product Line to all Non-Taxable Categories.

Following is a flow chart to help visualize the process described above. The flow chart also lists the next steps to be taken to set up Product Lines and Categories:


Are most Items Taxed?
Yes
No
Change name of "Default" Tax Code to "Taxable", & change Tax Rate accordingly
Change name of "Default" Product Line to "Taxable"
Add a new Tax Code entitled "Non-Taxable", with 0% tax rate.
Add a new Product Line entitled "Non-Taxable". Assign the Non-Taxable Tax Code to this Non-Taxable Product Line
Identify all Categories that are Non-Taxable and change their Product Line to Non Taxable.
Change name of "Default" Tax Code to "Non-Taxable"
Change name of "Default" Product Line "Non-Taxable"
Add a new Tax Code entitled "Taxable", with appropriate Tax Rate
Add a new Product Line entitled "Taxable". Assign the Taxable Tax Code to this Taxable Product Line.
Identify all Categories that are Taxable and change their Product Line to Taxable.

Related Topics

Tax Code Set Up Overview

Adding a Tax Code

Set Up Product Lines

The Category Editor

Copyright 2010, Resaleworld.com, Inc.

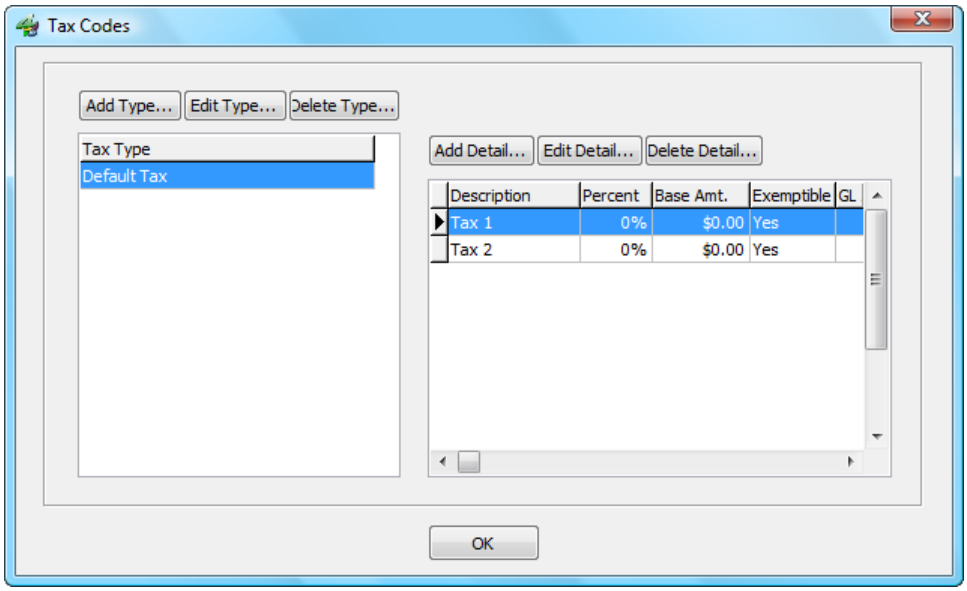
ADDING A TAX CODE

Inventory Module → *Tools* → *Tax Codes*

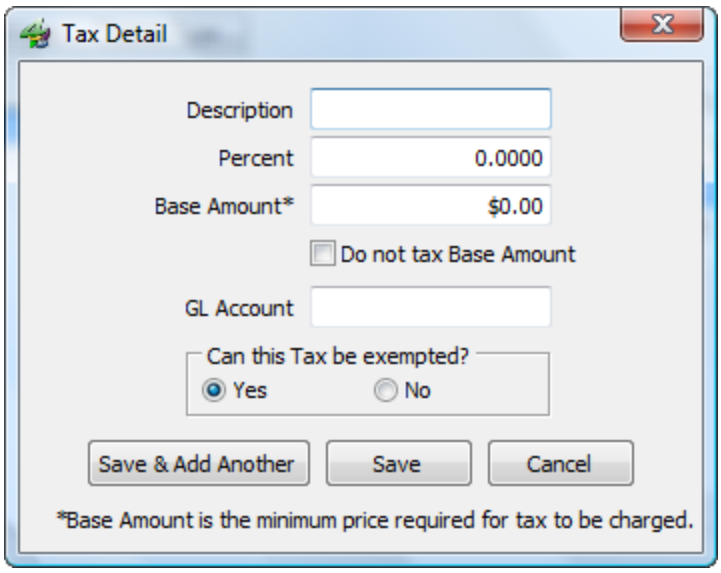
Tax Codes are attached to Product Lines, which in turn are attached to Categories. When you are finished setting up Tax Codes, Set Up Product Lines, then Set Up Categories.

To Add a Tax Code:

1. Select **Tools** → **Tax Codes** from the Main menu. The **Tax Codes** dialog will display:



2. Click the **Add Type** button, located at the upper left of the dialog.
3. Enter a **Description** for the **Tax Code** and click **OK**. The **Tax Detail** dialog will display:



4. Enter a description for the type of tax in the **Description** field. For instance, enter **State Tax**. Press the **<Tab>** key to advance to the next field.

5. Enter the tax percentage in the **Percent** field. Press the **<Tab>** key to advance to the next field.

6. If the tax does not take affect until a certain minimum dollar amount threshold is reached, enter the minimum amount necessary for the tax to take affect in the **Base Amount** field. Press the **<Tab>** key to advance to the next field.

   Example: Your State or Locality does not tax certain items under $75. By placing $75.00 in the Base Amount field, no tax will be assessed unless the item sells for more than $75.00.

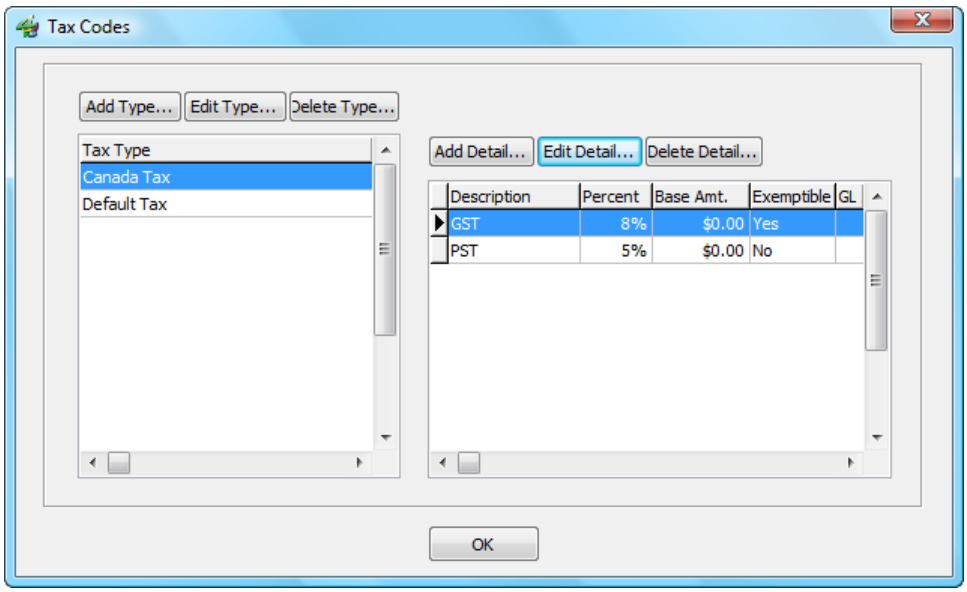
7. If you are using accounting software with Liberty, enter the appropriate General Ledger (GL) account number in the **GL Account** field.

8. If the tax can be exempted (which most can), select the **Yes** radio button in the **Exemptible** field. If the tax cannot be exempted, select **No**.

9. Click the **Save** or the **Save and Add Another** button. Generally you will select **Save**.

Note: *In localities with more than one tax, enter additional Tax Detail lines as necessary. For instance, in areas where there is a Local Tax and a State Tax, you would have two Tax Detail lines. Another example would be in Canada, the PST tax is mandatory for all items, whereas the GST tax is not mandatory for all items. To put a tax in to handle this situation, it is necessary to add two Tax Detail lines, and to make the GST exemptible whereas the PST would be not exemptible. See the following figure for an example:*

Copyright 2010, Resaleworld.com, Inc.



Related Topics

Tax Code Set Up Overview

Set Up Tax Codes

Set Up Product Lines

PRODUCT LINE OVERVIEW

Inventory Module → *Tools* → *Category Editor* → *Product Lines Tab*

Before **Product Lines** are set up, **Tax Codes** must be set up. If you have not set up Tax Codes, go back and do so before proceeding.

Product Lines have two purposes:

1. To assign a **Tax Code** to each **Category**. Doing so eliminates the need to enter a tax rate each time an item is entered. Considering the tens of thousands of items that will eventually be inventoried it is easy to see that this is a great time saver.
2. To group Categories for reporting purposes.

Copyright 2010, Resaleworld.com, Inc.

Every Category has a Product Line, and every Product Line has a Tax Code. In this way every item is correctly taxed.

> ***Note:*** *Every Category must have a Product Line.*

When you install Liberty you are provided with one Product Line. The name of this Product Line is **Default**. You may add as many Product Lines as you wish.

Related Topics

Set Up Product Lines

Why Group Categories Under Product Lines

The Category Editor

SET UP PRODUCT LINES

Inventory Module ➔ *Tools* ➔ *Category Editor* ➔ *Product Lines Tab*

Setting up **Product Lines** is the second step in the process of setting up **Categories**. To review, there are 5 steps to setting up Categories, of which this is the second:

1. Set Up Tax Codes (should already be performed).
2. Set Up Product Lines.
3. Set Up Categories.
4. Assign Product Lines to Categories.
5. Set Up and Associate Attributes to Categories

If you have not set up **Tax Codes**, do so before setting up Product Lines. Once you have set up Product Lines, proceed to the third step, which is to set up Categories. Do not set up Categories before setting up Product Lines.

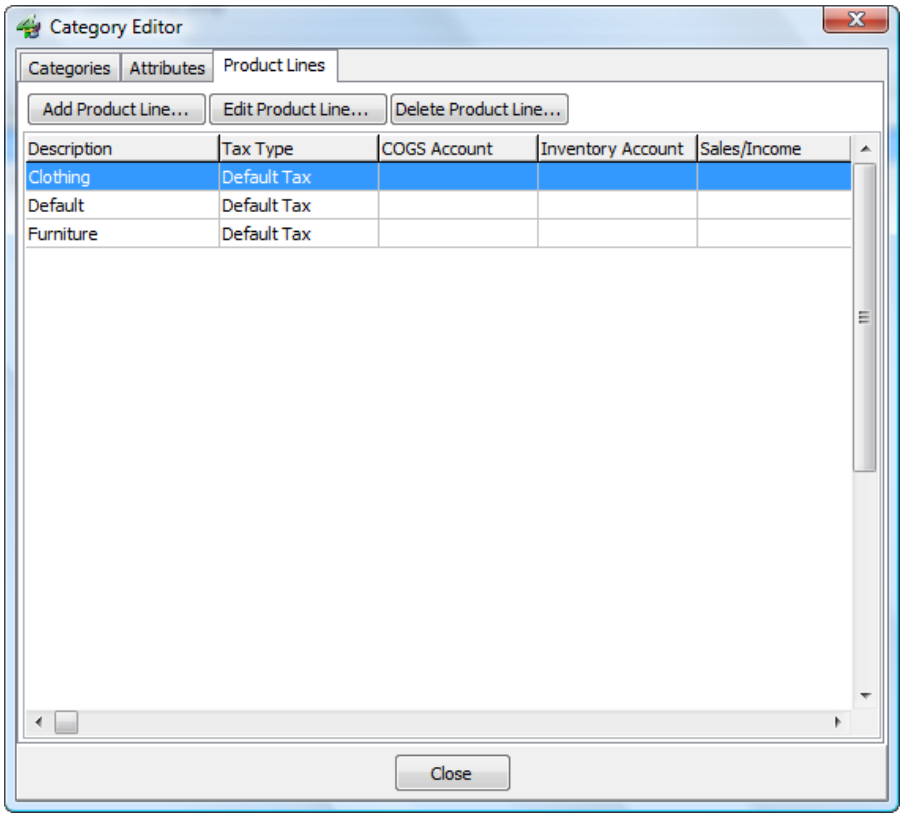
Copyright 2010, Resaleworld.com, Inc.

Most likely when you set up Tax Codes you created two Tax Codes, Taxable and Non Taxable. With Product Lines you want to do the same thing and create two Product Lines named Taxable and Non Taxable.

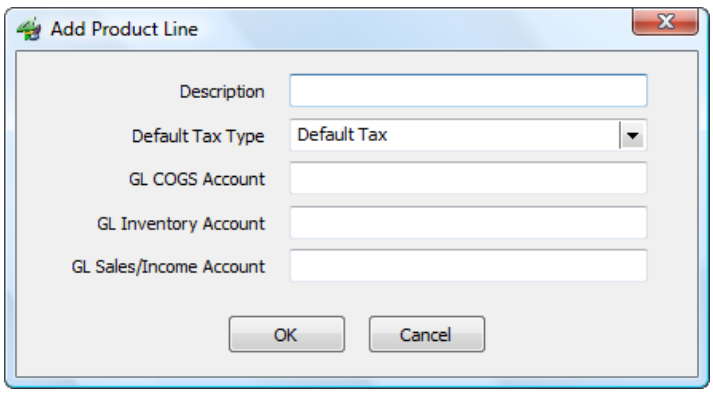
Following are instructions on how to Add, Change, and Delete Product Lines.

To Add a Product Line

1. Select **Tools** ➔ **Category Editor** from the Main menu.
2. Select the **Product Line** tab to display the Product Lines dialog:



3. Select the **Add Product Line** button. The **Add Product Line** dialog will display:



4. Enter a **Description** for the Product Line. For example, enter the word Taxable.

5. Select a **Default Tax Type** (a *Tax Code*) from the drop-down list. Be sure to match the Tax Code to the name of the Product Line. For example, the Taxable Product Line should be assigned the Taxable Tax Code, and the Non Taxable Product Line should be assigned the Non Taxable Tax Code.
6. If you are using accounting software in conjunction with Liberty, enter the appropriate accounting code in the **COGS Account**, **Inventory Account**, and/or **Sales/Income Account** fields. Otherwise leave these fields blank.
7. Click **OK**.

To Make Changes to a Product Line

1. Select **Tools** → **Category Editor** from the Main menu.
2. Select the **Product Line** tab.
3. Select the **Edit Product Line** button.
4. Make changes as necessary, and click **OK** when finished.

To Delete a Product Line

1. Select **Tools** → **Category Editor** from the Main menu.
2. Select the **Product Line** tab.
3. Select the **Delete Product Line** button.

> ***Note:*** *Product Lines cannot be deleted once a transaction (sale) takes place for an item utilizing that Product Line.*

Related Topics

Why Group Categories Under Product Lines

Assign Product Lines to Categories

The Category Editor

OVERVIEW OF CATEGORIES

Inventory Module → *Tools* → *Category Editor*

All items entered must have a **Category** assigned to them. Liberty comes with several hundred Categories already entered, however, all of these Categories are inactive. You must choose which ones to make active. This is accomplished in the Set up Wizard when Liberty is first installed, and in the Category Editor afterwards.

> ***Note**: It is not possible to add items until you activate one or more Categories.*

Categories are an absolutely key part of entering inventory into Liberty. The Category field is used to categorize items, and to associate Categories with other important information, including **Tax Codes, Product Lines,** and **Attributes**.

> ***Note**: Tax Codes and Product Lines must be set up prior to setting up Categories.*

On the Category Editor screen, the Options button allows you to select an existing base Category structure to use for your store. For most users, a 1-Level set up works best and Liberty will initially be configured to use this set up when creating categories. More "advanced users" looking for a more detailed level of inventory and the ability to generate more advanced reports have the option use a two- or three-level structure.

For example, if a store only sells a single type of inventory, such as women's clothing, there is no need to use multiple levels to categorize inventory. In a 3-Level structure, jeans would be categorized as ***Women's Apparel > Pants/Shorts > Jeans***. In a 1-Level structure there is no need to distinguish further - they are just jeans.

If a store sells men's, women's and children's clothing, a three-level setup would allow them to report on each category. Three levels just gives them the ability to report by "Department," "Section" and "Item". In the previous example, this would mean running reports for "Women's Apparel", "Pants/Shorts", and "Jeans".

Each Category has a **Tax Code** assigned to it. This makes inventory entry more efficient, because when the item is assigned a Category it gets its Tax Code at the same time. This combines two steps into one, which saves time.

Each Category may have one or more **Attributes** assigned to it. An Attribute is a characteristic or feature which helps describe the item. For instance, *color* and *fabric* help describe clothing, *material* and *era* help identify antiques. While attribute information may be entered into the

Copyright 2010, Resaleworld.com, Inc.

Description field, there are significant benefits to using Attributes, the most important being **consistent data entry**.

Consistent data entry makes reports more effective, particularly the Wish List, Lost Tag, Sales and Inventory reports. The more precise the information entered, the easier it is to analyze reports and manage business in general.

The Category Editor is used to assign Tax Codes and Attributes to Categories. It is also used to add, edit and delete Categories, and turn Categories on and off.

Categories are a powerful tool and well worth understanding fully. Proper set up of Categories streamlines the data entry process, and provides tremendous increases in speed, power, and efficiency throughout the system. You will benefit from the ability to generate inventory and sales reports, wish list matches, and lost tag matches in such a way as to dramatically increase the quality of the information at your fingertips. *With this power you can simultaneously increase profits and save time.*

Utilizing the power underlying the use of Categories does take a little time and effort. Once you see the benefits, we guarantee you will agree this time to have been very well spent.

Setting Up Categories

Setting up categories is easiest if you follow this sequence of steps:

1. Set Up Tax Codes (should already be performed).
2. Set Up Product Lines (should already be performed).
3. Set Up Categories.
4. Assign Product Lines to Categories.
5. Set Up and Associate Attributes to Categories.
6. (Optional) Establish prices using the Pricing Guide.

Related Topics

The Category Editor

Tax Code Set Up Overview

Set Up Product Lines

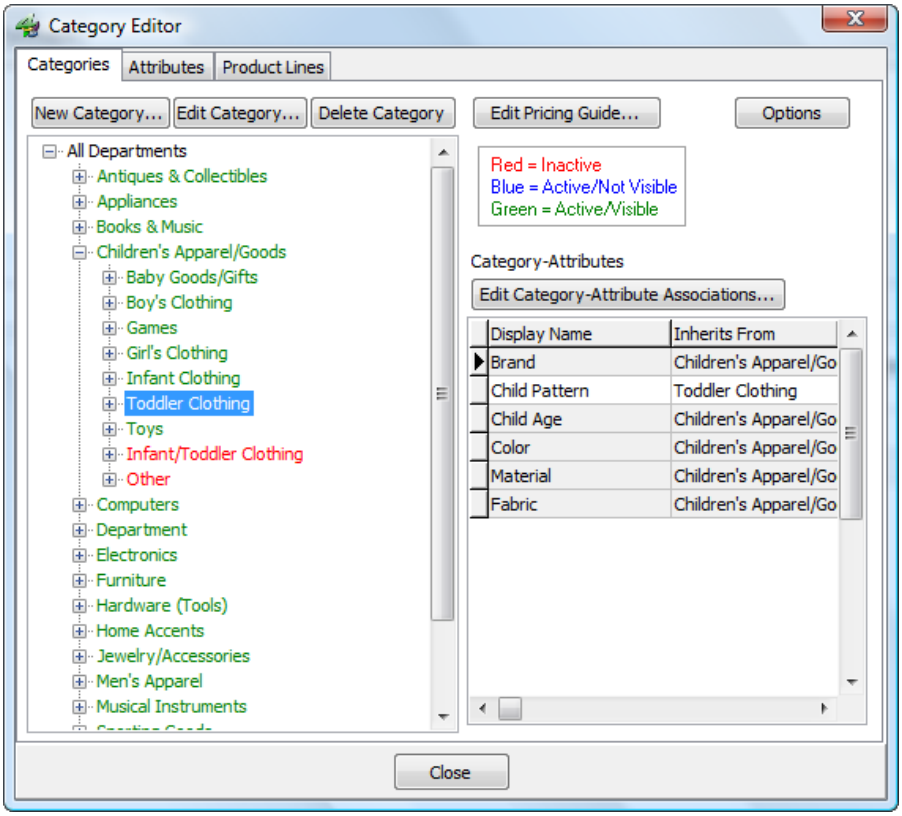
Overview of Attributes

Copyright 2010, Resaleworld.com, Inc.

CATEGORY EDITOR

Inventory Module → *Tools* → *Category Editor*

All items entered must have a **Category** assigned to them. In addition to managing Categories, the **Category Editor** controls a number of key functions in Liberty.



Use The Category Editor To:

1. **Manage Categories**.
    a. Add, change, and delete Categories.
    b. Make Categories Active or **Inactive**. Inactive Categories cannot be used.
    c. Make Categories Visible or **Invisible** in the Select Category dialog in the Item Entry Window.

   d. Assign Categories to Product Lines (which assigns a Tax Code to each Category as a result).

2. **Manage Product** Lines.
   a. Add, change, and delete Product Lines.
   b. Assign Tax Codes to Product Lines.
3. **Manage Attributes**.
   a. Add, change, and delete **Attribute Types** and **Attribute Values**.
   b. Determine which Attributes are used with which Categories.
   c. Assign the order of Attributes as they appear in the Item Entry Window.
   d. Make Attributes Active or Inactive.
   e. Determine the Display Name of Attribute.
   f. Choose whether an Attribute is included in an Item's Title.
   g. Specify whether an Attribute is a Size, Brand, or Color.
4. **Assign Prices** to Categories.
   a. The **Pricing Guide** allows predetermined prices to appear on screen as items are entered. This assists in pricing items more consistently and accurately.

To View The Category Editor:

1. Choose **Tools** from the Main Menu of Liberty Inventory.
2. Choose **Category Editor** from the Tools menu.

Copyright 2010, Resaleworld.com, Inc.

Definitions Of Terms Used In The Category Editor:

Category	Item type, e.g. Blouse, Table, Tennis Racquet, etc. Known as **Type** in previous versions of Liberty and Consignment Boutique, the term Category is now used because Types are now sorted into Categories using a Category Structure.
Category Structure	Category Structure consists of three levels: Category 1, Category 2, and Category 3. You can see the Category Structure displayed graphically by viewing the Category Editor.
Category Editor	Display that shows all Categories. Appears in the left half of the Category Editor window.
Level 1 Category	The top level Category. Examples of Level 1 Categories are Women's Apparel, Antiques & Collectibles, and Jewelry & Accessories.
Level 2 Category	The middle level Category. Examples of Level 2 Category's that fit under the Level 1 Category *Women's Apparel* are Shoes, Dresses/Skirts, and Suits.
Level 3 Category	The lowest and most specific Category level. Examples of Level 3 Category's that fit under the Level 2 Category *Jewelry* (which is under the Category 1 of Jewelry/Accessories) are Ring, Earrings, Bracelet, and Necklace.
Cascade	A **Cascade** is when a change is made to a higher level Category and the change flows through to all lower level Categories contained beneath that higher level Category. Cascade is the opposite of Inherit. For example, take Category 1, Women's Apparel. If you change its Product Line from Non-Taxable to Taxable, this change **Cascades** to all Category 2's (e.g. Suits, Shoes, Tops, etc.) and all Category 3's below these (2 pc suits, sneakers, sweaters, etc.) - these now all have the Taxable Product Line assigned to them. Cascading also occurs from Category 2 to Category 3 items. Cascading does not occur upward, i.e. a change made to a Category 3 parameter does not change the Category 2 or 1 above it. Nor does a change made to a Category 2 item affect the Category 1 above it.
Active	An **Active** Category may be used during item entry. An **Inactive** Category may not be used.

Copyright 2010, Resaleworld.com, Inc.

Visible	**Visible** Categories appear in the **Select Category dialog**. The Select Category dialog is found in the Item Entry window by pressing **F2** when in the Category field.
Attribute	A characteristic or feature which helps describe merchandise. For instance, color and fabric help describe clothing. Attributes may be assigned at any Category Level - 1, 2, or 3. When an Attribute is assigned to a Category, Category Levels below that Category inherit that Attribute as well (see definition, below).
Attribute Type and Attribute Value	Attribute Value is a subset of Attribute Type. This is similar to a Level 3 Category being a subset of a Level 2 Category. For instance, an Attribute Type might be Color, which has the Attribute values of red, green, blue, brown, beige, etc. Another example: Attribute Values for the Attribute Type of Gemstone are diamond, ruby, and emerald.
Attribute Panel	The list of Attributes that appear in the Item Entry window, below the Brand field.
Inherit	When an Attribute Type is assigned to a Level 1 Category, then all Level 2 and 3 Category's will have Color appear in the Attribute Panel. This is because these Level 2 and 3 Categories **Inherit** that Attribute from the Category 1. **Example:** the Attribute Type **Color** is assigned to the Level 1 Category Women's Apparel. All Category 2's (Dresses, Pants, etc.) and 3's (Boots, Sweaters, etc.) below Women's Apparel **Inherit** the attribute **Color**. For convenience, inheritance is shown in the Category Editor. Look on Category tab in the Category - Attribute area, which is located in the lower right part of the dialog.
Title	An item's Title is created by combining the Attribute(s), Brand and Category 3 of an item into a single phrase. Examples: Size 8 Levi's Jeans; 48 inch Chippendale Table; Men's Large Blue North Face Parka. Titles are useful when searching for items using Item Lookup or the Wish List, and for posting items for sale online. In addition:

Copyright 2010, Resaleworld.com, Inc.

1. Titles are created automatically for every item.
2. Titles appear in the Title field in the Item Entry window, and may be edited.
3. Any number of Attributes may be included in the Title (including zero).
4. The choice of whether an Attribute will be included in the Title is made in the Category Editor.
5. If the Brand field is left blank then the Title will not contain a brand. The same is true of Attributes.
6. The order of Attributes for the Category determines the order the Attributes are listed in the Title.

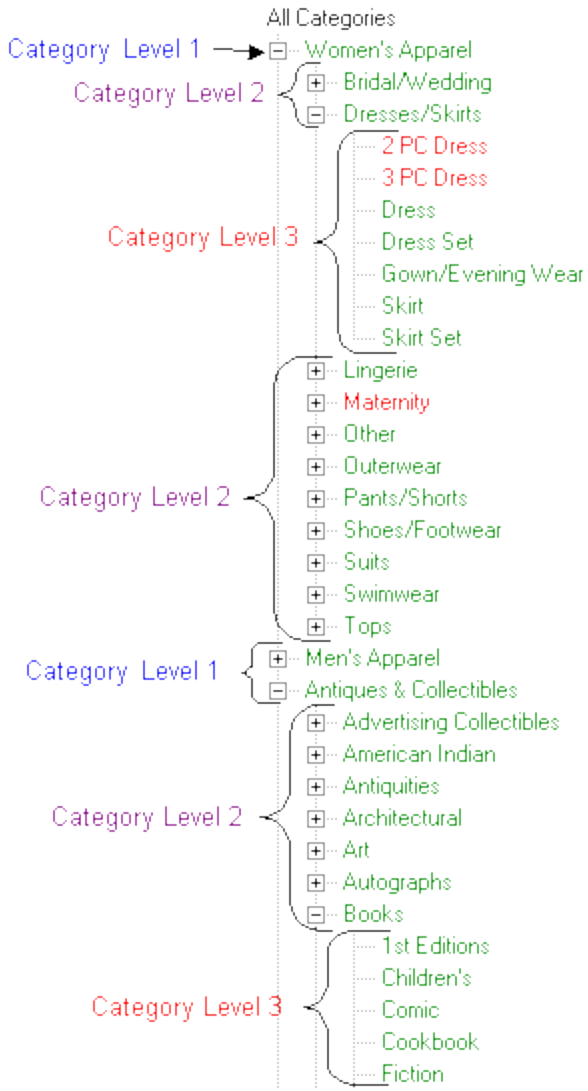
Product Line A group of Categories. Product Lines are used to assign Tax Codes and for reporting purposes.

Related Topics

Categories Overview

Overview of Attributes

CATEGORY EDITOR DIAGRAM



TURN CATEGORIES ON AND OFF

Inventory Module → *Tools* → *Category Editor* → *Categories Tab*

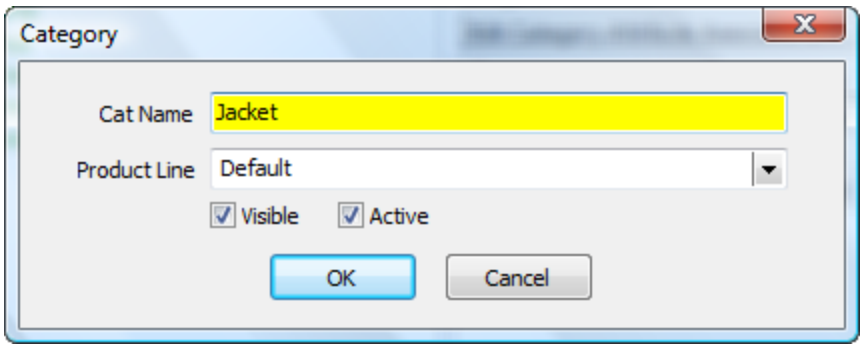
When entering items into Liberty the **Categories** you wish to use must be **Active**. To **Activate** Categories, use the **Category Editor**. (It is also possible to activate categories in the Set up Wizard when Liberty is first installed.)

You also have the ability to determine which Active Categories are visible or invisible in the Select Category dialog in the Item Entry window. The default is for all Categories to be Visible.

Why make a Category Active but Invisible? Doing so reduces the number of Categories shown in the Select Category dialog, without removing the ability to use that particular Category. This is ideal for Categories that are rarely used.

To Activate a Category:

1. From the Main menu, click on **Tools** → **Category Editor**. Notice that you are on the **Category** tab of the **Category Editor**.
2. In the Category Editor, highlight the **Category 1** to be Activated.
3. Select the **Edit Category** button. The Category dialog will display:



4. Place a check in the **Active** check box, then select **OK**.
5. A dialog will appear asking **Would you like to make all sub-categories active?**. Clicking **Yes** will cause the change to Cascade to all Category 2 and Category 3 items beneath the selected Category 1.
6. If there are Category 2 or Category 3 items in this Category 1 that should be kept

Copyright 2010, Resaleworld.com, Inc.

Inactive, use the **Category Editor** to navigate to and highlight the Category. Click on the Category to highlight it, then:

a. Select the **Edit Category** button.

b. Remove the check in the **Active** check box.

c. Select **OK**. Note that the change will Cascade to all Category 3 items beneath a Category 2 item that is changed.

7. Repeat steps 2-6 until all Categories are set up as desired.

To Make a Category Invisible:

1. From the Main menu, click on **Tools** → **Category Editor**. You are now on the **Category** tab of the **Category Editor**.
2. In the Category Editor, highlight the **Category 1** you wish to make Invisible.
3. Select the **Edit Category** button. The **Edit Category** dialog will display (see above).
4. Remove the check from the **Visible** check box.
5. Select **OK**. Note that this change will Cascade to all Category items beneath this Category.
6. If there are Category 2 or Category 3 items in this Category 1 that should be kept Visible, use the **Category Editor** to navigate to and highlight the Category, then:

   a. Select the **Edit Category** button.

   b. Make sure the **Active** check box is selected.

   c. Select **OK**. Note that the change will Cascade to all Category items beneath the Category item that is changed.

7. Repeat steps 2-6 until all Categories are set as needed.

Related Topics

Categories Overview

The Category Editor

Copyright 2010, Resaleworld.com, Inc.

ADD, CHANGE & DELETE CATEGORIES

Inventory Module → *Tools* → *Category Editor*

Note: *Once a Category has been used to describe an item (even just one), it cannot be deleted. You may, however, make the Category inactive and/or invisible.*

To Add a New Level 1 Category:

1. From the Main menu, click on **Tools** → **Category Editor**.
2. In the **Category Editor**, highlight **All Category Editor**.
3. Select the **New Category** button. The **Category dialog** will appear.
4. Enter the name of the Level 1 Category item to be added in the **Category Name** field.
5. Choose the appropriate Product Line from the **Product Line** pick list.
6. You will generally leave the **Visible** and **Active** check boxes checked.
7. Select **OK**.

To Add a New Level 2 Category:

1. From the Main menu, click on **Tools** → **Category Editor**.
2. In the **Category Editor**, highlight the Level 1 Category item that the new Level 2 Category item will go under.
3. Select the **New Category** button. The **Category dialog** will appear.
4. Enter the name of the Level 2 Category item to be added in the Category Name field.
5. Choose the appropriate Product Line from the Product Line pick list.
6. You will generally leave the **Visible** and **Active** check boxes checked.
7. Select **OK**.

Copyright 2010, Resaleworld.com, Inc.

To Add a New Level 3 Category:

There are two methods for adding Categories. The first is preferred, as it provides more information and allows for Categories to be setup more consistently. Use the second option to add a Level 3 Category on the fly while entering items (not generally recommended).

1. From the Main menu, click on **Tools** → **Category Editor**.
2. In the Category Editor, highlight the Level 2 Category item that the new Level 3 Category item will go under.
3. Select the **New Category** button. The **Category dialog** will appear.
4. Enter the name of the Level 3 Category item to be added in the **Category Name** field.
5. Choose the appropriate **Product Line** from the Product Line pick list.
6. You will generally leave the **Visible** and **Active** check boxes checked.
7. Select **OK**.

> ***Note:*** *The error message* ***Cannot insert duplicate key row in object 'CATEGORY' with unique index'AK_PARENT'.*** *indicates you are trying to enter a duplicate Level 3 Category. Click* ***OK*** *and then choose that Category as you would normally.*

To Add a New Level 3 Category While Entering Inventory:

1. While entering an item into inventory, with the cursor in the Category field, press F3. The Category Quick Add dialog will appear.
2. Select an existing Level 1 and Level 2 Category from the drop down menu, then enter a new Level 3 Category.
3. Select a **Tax Type**.
4. Click **OK**.

To Change a Category:

1. From the Main menu, click on **Tools** → **Category Editor**.
2. In the Category Editor, find and highlight the Category item to be changed.

Copyright 2010, Resaleworld.com, Inc.

3. Select the **Edit Category** button.
4. Make changes as necessary, and select **OK**.

To Delete a Category

Note: Once a Category has been used to describe an item (even just one), it can not be deleted.

1. From the Main menu, click on **Tools** ➔ **Category Editor**.
2. In the Category Editor, highlight the Category item to be deleted.
3. Select the **Delete Category** button and select **OK**.

Category Dialog Fields

Parent Category	The Category one level above the selected Category. For instance, the Parent Category of Blouse is Tops, and the Parent Category of Tops is Women's Apparel.
Level	There are three Category Levels: 1, 2, and 3. Level 3 Categories are subcategories of Level 2 Categories. Level 2 Categories are subcategories of Level 1 Categories.
Cat Name	The name given to the Category.
Product Line	A group of Categories. Product Lines are used to assign Tax Codes and for reporting purposes.
Visible	**Visible** Categories appear in the **Select Category dialog**. The Select Category dialog is found in the Item Entry window by pressing **F2** when in the Category field.
Active	An **Active** Category may be used during item entry. An **Inactive** Category may not be used.

Related Topics

Categories Overview

The Category Editor

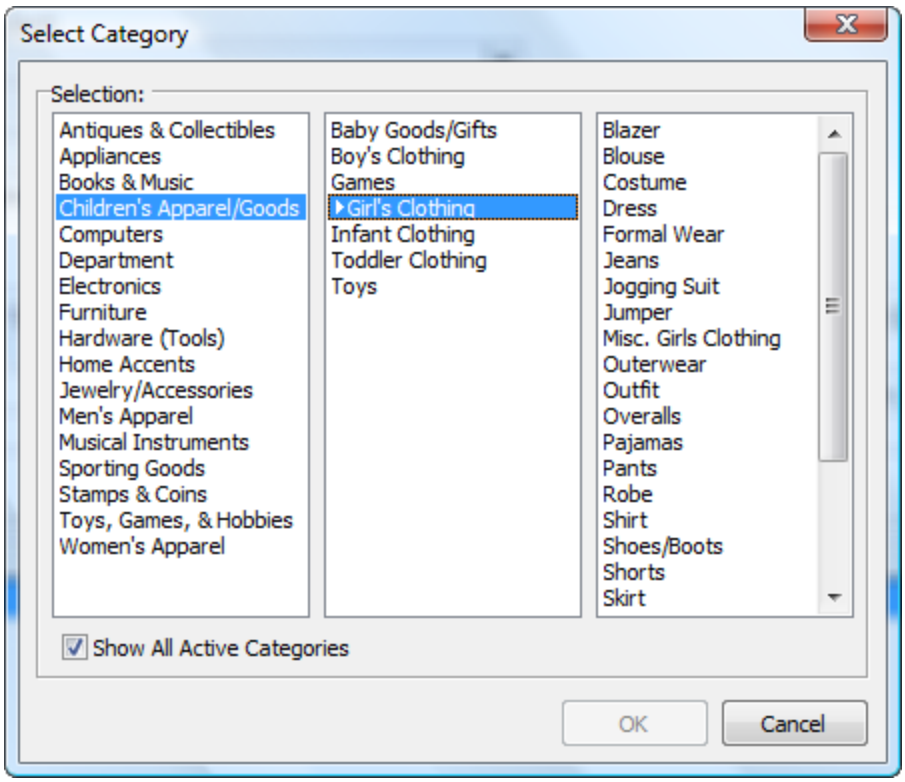
Copyright 2010, Resaleworld.com, Inc.

Select Categories When Entering Items in the Item Entry Window

Inventory Module ➔ *Item Entry Window* ➔ *Category Field* ➔ *<F2> Key*

When entering items there are two methods to choose a category:

1. Type the **Category** into the Category field
2. Select a Category from the **Select Category** dialog (below).



You may use either a mouse or the keyboard to use this dialog. To use the keyboard please take note of the following:

1. The right pointing triangle indicates where the cursor is.
2. Type the first letter of a Category to move the cursor to that point.
3. To move up and down a column use the **Up Arrow**, **Down Arrow**, **<Page Up>** and/or

Copyright 2010, Resaleworld.com, Inc.

<Page Down> keys.

4. To move from one column to another use the **Right Arrow** and **Left Arrow** keys.

Select Category Dialog Fields

Left Column	Lists all **Category Level 1 Category** items.
Center Column	Lists all **Category Level 2 Category** items.
Right Column	Lists all **Category Level 3 Category** items.
Show All Active Categories	Check this to show all Invisible as well as Visible Categories. Categories that are **Visible** appear in the Select Category dialog. Categories that are **Invisible** do not appear in the Select Category dialog.

Related Topics

Categories Overview

Inventory Overview

How to Enter Items Faster

Pricing Guide (Assign Prices to Categories)

Inventory Module → *Tools* → *Category Editor* → *Edit Pricing Guide Button*

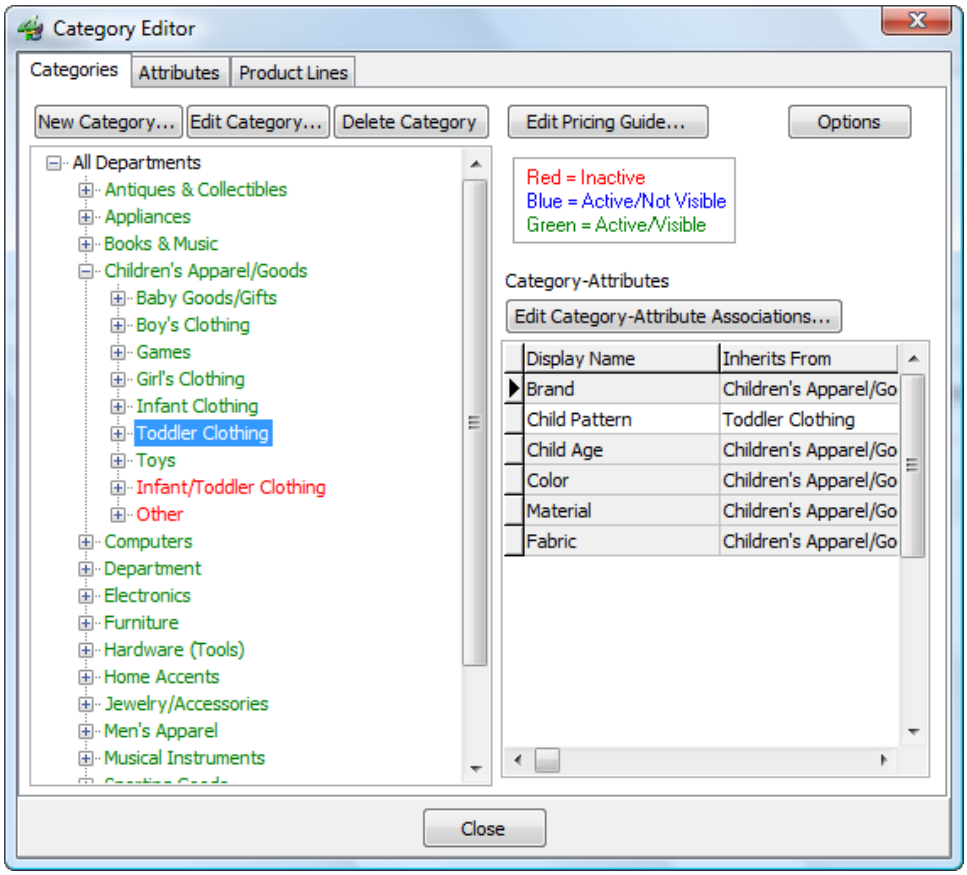
Use the **Pricing Guide** to associates a standard price with a particular Category. This helps maintain consistency and accuracy when pricing items. It is especially useful when you wish like items to be entered into with the same price every time.

When a Category has a price associated with it through the Pricing Guide, a list of possible prices will display when the cursor lands in the Price/BIN field.

Copyright 2010, Resaleworld.com, Inc.

To Associate Prices with Categories:

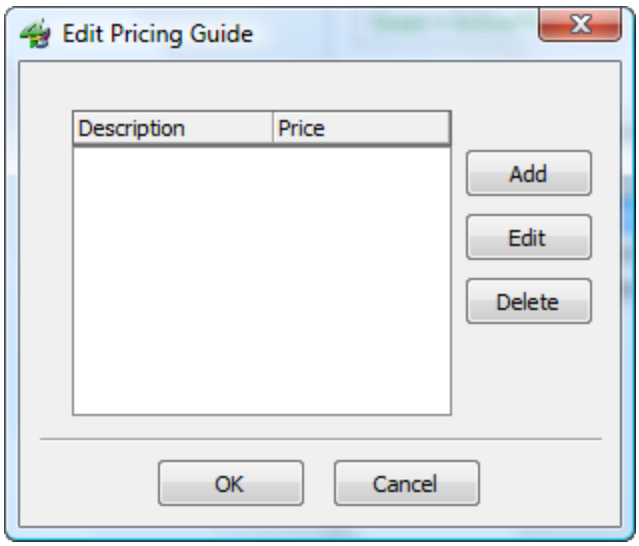
1. Select **Tools** → **Category Editor**.



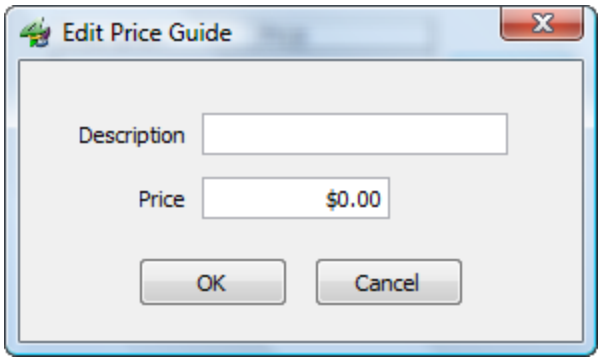
2. Navigate to the **Category** to which prices are to be entered in the **Pricing Guide**. Prices may be associated to any Category Level, although Category 3 is generally the most effective level at which to associate prices as higher levels are generally too broad.

3. Select the **Edit Pricing Guide** button. The Edit Pricing Guide dialog will display.

Copyright 2010, Resaleworld.com, Inc.



4. Select the **Add** button. The **Edit Price Guide** dialog will display.



5. Enter a description in the **Description** field, and a **Price** in the Price field.

Example: For the Category of Rings, a different price might be entered for different materials, e.g. Gold (ring) could be set at $100.00, Silver at $65.00, etc.

To Use the Pricing Guide When Entering Items:

1. When the cursor lands in the **Price/BIN** field, the Price Guide for that item's **Category** will appear. (If no prices have been associated for the Category selected (above), the Price Guide will not appear.)
2. Press the <**F2**> key. The **Select Price** dialog will display.
3. Highlight the **Description/Price** to select it, then click the **OK** button.
4. Continue entering information as needed.

Copyright 2010, Resaleworld.com, Inc.

WHY CATEGORIES ARE ASSIGNED A PRODUCT LINE

Inventory Module → *Tools* → *Category Editor*

Product Lines are used to associate a **Tax Code** to a **Category** to speed item entry. Product Lines are also used to **group** Categories together for reporting purposes.

Example: Take a clothing store sells shoes to both women and children. A separate Category exists for each: Women's Apparel - Shoes - (Type of Shoe), and Children's Apparel - Shoes - (Type of Shoe). Running a Category Report will show sales in each Category separately.

By creating a Shoe Product Line and associating each with this Product Line, a Sales by Product Line report can be run that show sales of ALL shoes across all Categories.

While every Category **must** have a Product Line associated with it for Tax purposes, using Product Lines to group Categories together for reporting purposes is optional.

Some states have tax laws that make grouping Categories into Product Lines problematic. For instance the State of Minnesota has no tax on clothing, but it does tax Belts. In such a case there are two options.

1. Change the **Tax Code** as necessary when items are entered. For example, if most Belts are Taxable and only a few are Non-Taxable, assign Belts to a Product Line that is taxed. When entering non-Taxable Belts change the Tax Code field to Non-Taxable. This method may be best if you are not relying on Product Lines for reporting purposes.
2. Create two Product Lines, one Taxable, and one non-Taxable. For example, a Taxable Belt Product Line and a Non-Taxable Belt Product Line. This will also require creating two Belt Categories - Belt (Taxable) and Belt (Non-Taxable). This method may be best if you are relying on Product Lines for reporting purposes.

Related Topics

Set Up Product Lines

Assign Product Lines to Categories

Copyright 2010, Resaleworld.com, Inc.

ASSIGN PRODUCT LINES TO CATEGORIES

Inventory Module → *Tools* → *Category Editor*

To Assign Product Lines To Categories:

1. From the Main menu, choose **Tools** → **Category Editor**. You are now on the Category tab of the Category Editor.
2. In the **Category Editor**, highlight the **Category 1** to which you wish to assign **Product Lines**.
3. Select the **Edit Category** button.
4. Select a Product Line from the Product Line drop-down list.
5. Select **OK**. Note that this change will Cascade to all Category items beneath this Category.
6. If there are Category 2 or Category 3 items in this Category 1 that should have a different Product Line, navigate to the item using the **Category Editor**, highlight the Category, then repeat steps 3-5. Note that the change will Cascade to all Category items beneath the Category item that is changed.
7. Repeat steps 2-6 until as needed so that all Categories are assigned the proper Product Line.

Related Topics

Categories Overview

The Category Editor

Copyright 2010, Resaleworld.com, Inc.

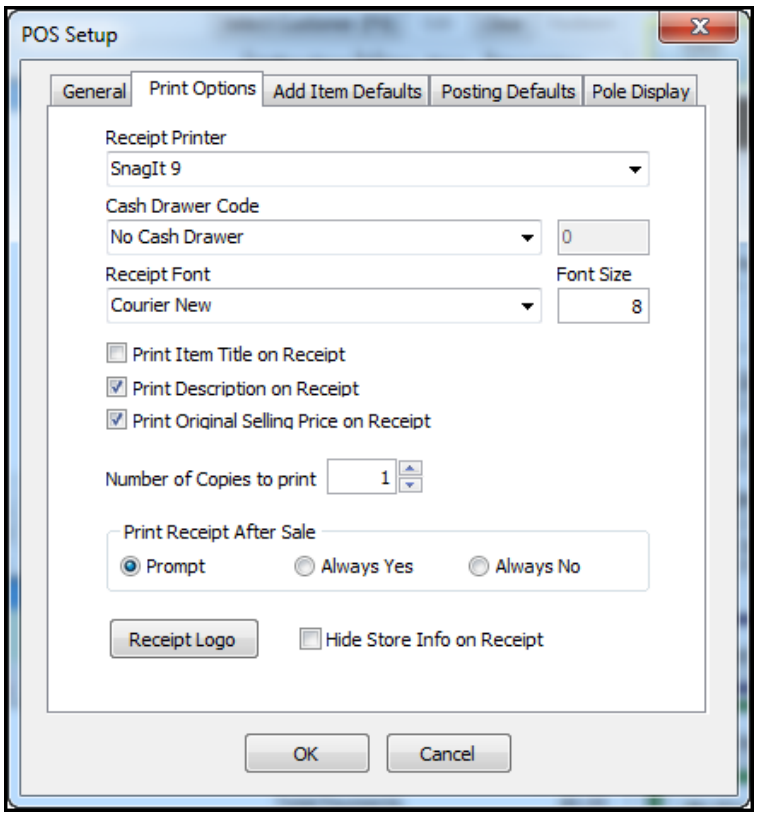
SET UP POS EQUIPMENT

PoS Module → Setup → PoS Setup → Print Options Tab

Liberty Point of Sale is designed to operate in conjunction with a PoS Receipt Printer for printer receipts, and Electronic Cash Drawers that connect to the Receipt Printer so that the drawer opens when the receipt prints.

To Set Up PoS Equipment In Liberty:

1. From the main menu of Liberty Point of Sale click on **Setup → PoS Setup**.
2. Select the **Print Options** tab.



3. Select the **Receipt Printer** from the drop-down list.
4. Select the correct **Cash Drawer Code** from the drop-down list.

> ***Note**: If you select **Other** in the Cash Drawer drop-down list, enter the Cash Drawer Code in the field immediately to the right of the Cash Drawer Code field.*

5. Select **OK** when finished.

Related Topic

Select Printers

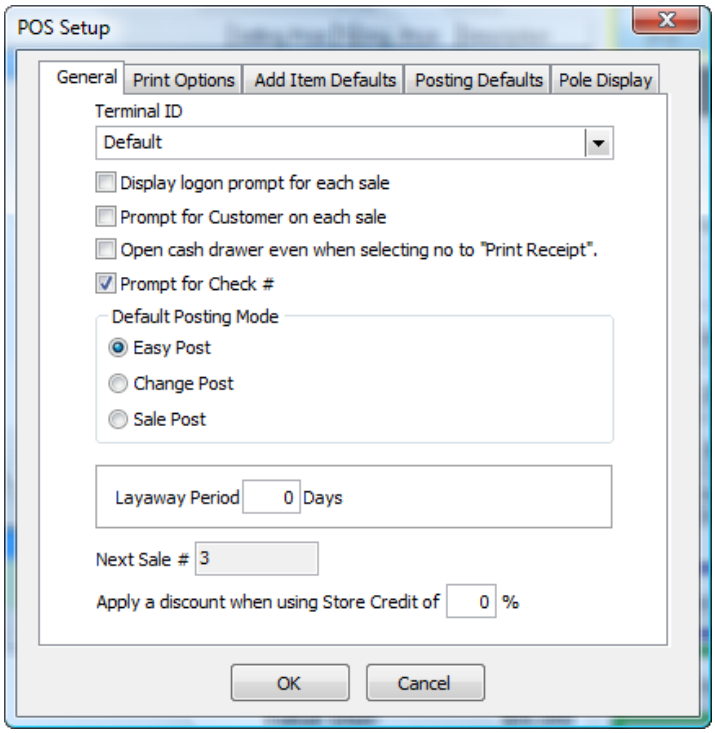
SET UP POS DEFAULT PREFERENCES

PoS Module ➔ *Setup* ➔ *PoS Setup*

Liberty PoS contains a number of default settings to make working with PoS faster and easier.

To Set Up PoS Defaults:

1. Select **PoS** → **Setup** → **PoS Setup**. The **PoS Setup** window will display.



2. Navigate through the fields on the various tabs and set your preferences according to the information provided in the table below.
3. When finished, click the **OK** button.

Fields Located on PoS Set Up – General Tab

Terminal ID	If you are running Liberty on two or more workstations, each workstation must have a unique name assigned to it. This will allow you to track terminal transactions separately. See the section entitled Assign Terminal Ids for more details.
Display logon prompt for each sale	When checked, requires sales clerk to log on with a user name and password before every sale. See Set Up Employee Access to Liberty for more information.

Prompt for Customer on each sale	When checked, requires the sales clerk to lookup a customer prior to transacting a sale. Used for tracking customer purchases. See Look Up an Account in Liberty PoS for more information.
Open cash drawer even when selecting no to *Print Receipt*	Recommend that this be yes (with a check in the check box). For more information see the section entitled Set Up PoS Equipment.
Prompt for Check #	Select when you wish to track check numbers. A dialog will appear to enter the check number whenever Check is chosen as the method of payment.
Default Posting Mode	Choose the posting mode you use most often. See PoS Fields and Functions for more information.
Layaway Period	Allows you to specify the number of days an item can be put on Layaway by a customer.
Next Sale	Indicates the number that will be assigned to the next sales transaction.
Apply a Discount When Using a Store Credit of __%	Indicates the amount of the discount to apply to a sale when paying for items using a Store Credit.

Fields Located on PoS Set Up – Print Options Tab

Receipt Printer	Select the correct printer for printing PoS Receipts.
Cash Drawer Code	Select the correct Cash Drawer Code.
Receipt Font	Enter the font you wish to use when printing receipts.
Print Item Title on Receipt	When checked, the Item Title will be printed on the receipt.
Print Description on Receipt	When checked, the item's description will appear on the receipt.
Print Original Selling Price on Receipt	When checked prints the item's original selling price on the receipt.
Number of Copies to print	Choose the number of receipts to print for each sale. This only works with receipt printers that support this capability.
Print Receipt After Sale	Choose whether or not users are to be prompted to print a receipt.
Receipt Logo	Choose a logo to be printed on the receipt. Logo must be in bitmap (.BMP) format.

Copyright 2010, Resaleworld.com, Inc.

Hide Store Info on Receipt	Check box used to indicate that your store information will not be printed on the receipt.

Fields Located on PoS Set Up - Posting Defaults Tab

ExpiredItems	Items may be set to expire at the end of the consignment period. If you wish to have this automatically occur, choose **Always Expire**. If you wish to have the ability to override the expiration and still pay the consignor in some cases, choose **Show Prompt**.
Item Fees	When the price of an item is reduced there are two options for handling the item fee: 1. Choosing **Adjust Item Fees with Markdowns and Sale Post** reduces the item fee when the item price is reduced. 2. Choosing Adjust Price to maintain full Item Fees keeps the full item fee. See the sections entitled About Item Fees and Set Up Item Fees for more information on Item Fees.
Calculate Net on Original Price on Change Post	When the price a consigned item sells for is reduced, the net amount due to the consignor is usually reduced as well. If your store policy is to always reduce the net paid to consignors when an item's price is reduced, then select **Always Yes** (this is the case for most stores). If your store policy is to sometimes reduce the net amount due consignors when the price the item sells for is reduced, select **Prompt** (this is sometimes the case). If your store policy is to never reduce the net paid to consignors when the price of an item – and this is rarely the case – select **Always No**.
Calculate Sale Price on Original Price	When Sale Post is selected, the **Discount Percent** dialog appears. This default controls the **Calculate Sale Price on Original Price** check box in the Discount Percent dialog. A check in this field's check box will cause a check to appear automatically in the Discount Percent dialog. Similarly, leaving this check box blank will leave the check box in the Discount Percent dialog to be blank.

	If circumstances warrant, set the **Minimum Security Level to Override** field to a level higher than 0. See Set Up Security Levels for Employee Access to Liberty for more information about security and passwords.
Override Preset Nets	When Sale Post is selected, the **Discount Percent** dialog appears. This default controls the **Override Preset Nets** check box in the Discount Percent dialog. A check in this field's check box will cause a check to appear automatically in the Discount Percent dialog. Similarly, leaving this check box blank will leave the check box in the Discount Percent dialog to be blank. If circumstances warrant, set the **Minimum Security Level to Override** field to a level higher than 0. See Set Up Security Levels for Employee Access to Liberty for more information about security and passwords.
Calculate Net on Original Price	When Sale Post is selected, the **Discount Percent** dialog appears. This default controls the **Calculate Net on Original Price** check box in the Discount Percent dialog. A check in this field's check box will cause a check to appear automatically in the Discount Percent dialog. Similarly, leaving this check box blank will leave the check box in the Discount Percent dialog to be blank. If circumstances warrant, set the **Minimum Security Level to Override** field to a level higher than 0. See Set Up Security Levels for Employee Access to Liberty for more information about security and passwords.

Related Topics

Assign Terminal IDs

Set Up Fee Types

Set Up Payment Types

Set Up PoS Equipment

Set Up Terminal IDs

About Item Fees

Set Up Item Fees

Copyright 2010, Resaleworld.com, Inc.

SET UP TERMINAL IDS

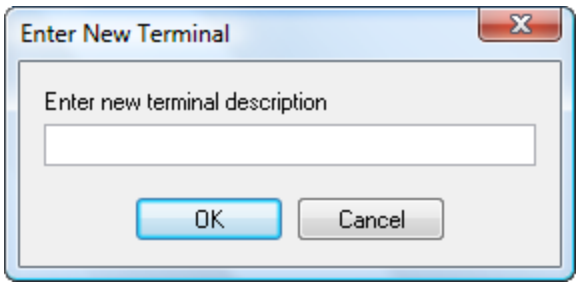
PoS Module → *Setup* → *Maintain Terminals*

If you are running Liberty on two or more workstations, you must first create a name for each workstation. After the names are created, you must then assign the name to the workstation. This will allow you to track terminal transactions separately.

To Create Workstation Names:

1. Start Liberty Point of Sale.
2. Click on **PoS Setup** → **Maintain Terminals**.

   Server will already be entered for use on the server.
3. Click on the **Add** button.



4. Enter a terminal name in the text box at bottom of the dialog box, then click **Save**.
5. Repeat steps 3 - 4 until all terminal names are added, then click on the **Close** button.
6. Once names are created, assigned them to terminals. See Assign terminal IDs for more information.

Related Topic

Assign Terminal IDs

Assign Terminal IDs

PoS Module → *Setup* → *PoS Setup*

If you are running Liberty on two or more workstations, each workstation must have a unique name assigned to it. This will allow you to track terminal transactions separately.

If you are running multiple Liberty point of sale terminals, you need to assign a unique name or ID to each terminal. This will allow you to track terminal transactions separately. Terminal IDs are assigned in Liberty Point of Sale.

Assign Names to Workstations:

1. Create a name for each workstation if you have not already done so. See Set up terminal IDs for more information.
2. Repeat the following steps on each workstation:
    a. Select **Setup** → **PoS Setup** from the PoS Main menu.
    b. In the **Terminal ID** field, select the name for this terminal from the **Terminal ID** drop-down list.
    c. Click on the **OK** button.

Related Topic

Set up Terminal IDs

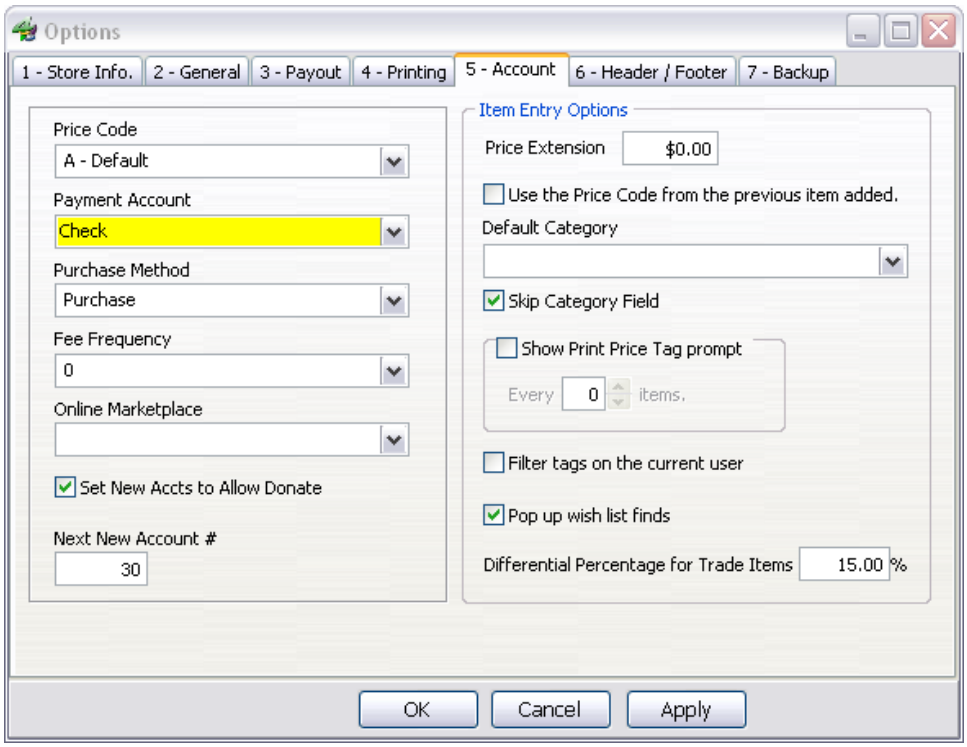
Define Default Information for Accounts

Inventory Module → Tools → Options → Account Tab

Defining default information for accounts will make it easier to manage accounts. Select the default values you are most likely to use.

To Set Account Defaults

1. From the Main Menu, select **Tools → Options**.
2. Click on the **5 - Account** tab.



Account Tab Field Definitions

Price Code — Select the default price code for all accounts. When an account is created, this Price Code will become the default price code for the new account. Note that you can change this within each account: each account can have it's own Price Code default. This is set in the Add'l Info window.

Payment Code — Select the default payment code for new accounts. Select check if paying your clients by check or statement if paying your client in cash. Note that the default payment code may be changed in each account using the **Default Payment Method** in the Additional Info Window.

Payment codes are set up in Set Up Payment Accounts.

Copyright 2010, Resaleworld.com, Inc.

Purchase Method	Select **Consign** if most of the inventory you carry is the property of your clients. Select **Purchase** if most of the inventory you carry is your property.
Fee Frequency	Select a default **Fee Frequency** from the drop-down provided. The Fee Frequency selected will be assigned to each new client account when it is created. Fee Frequencies are used to assess fees to multiple accounts simultaneously. An example would be an annual consignment fee. For more information about Fee Frequencies, see the section entitled Set Up Fee Frequencies.
Online Marketplace	If items are sold in multiple Marketplaces, select the most frequently used Marketplace as the default here. This selection will be used as the default marketplace for every new account that is created. If you would prefer to assign the marketplace for each account and item, leave this field blank.
Set New Accts to Allow Donate	Selects the default **Set New Accts toAllow Donate** setting for all accounts. Choosing No (no check mark) makes it impossible to post items as **Donated**. Choose Yes (enter a check in the check box) to have all items in accounts flagged to allow donation. The selection here will be the default **Set New Accts to Allow Donate** setting for every new account that is created. Note that you may change this setting within each account on the Add'l Info window.
Next New Account #	Enter the next store account number that should come up when adding a new account. This is useful if you need to add an account out of sequence.
Price Extension	**Price Extension** is the two digits appearing to the right of the decimal in a price (the cents component of price). When adding an item, if you wish to list a price of $12.00, it is only necessary to press **12** <enter>, and the cents are automatically filled in. To change from the system default of .00 for cents to another **Price Extension**, e.g. **.99**, enter the cents in this field. All items in this example will be priced with 99 cents, e.g. 12.99, 28.99, etc.
Use the Price Code from the previous item added	When adding items, the **Price Code** entered automatically by Liberty is based on the Price Code default, set above. Check this box if you wish to carry forward a changed Price Code as you add items. **Example:** Default Price Code for an account is A. Enter several items with A as the Price Code, then change the Price Code to B

Copyright 2010, Resaleworld.com, Inc.

	for an item. If this box is not checked, the next item's Price Code will be A. If this box is checked, the next item's Price Code will be B, because you have set the system to carry forward the last Price Code entered.
Default Category	If the same Category is frequently selected when entering items, entering it here as a default will help save time.
Show the Price Tag Prompt	Normally the procedure of printing price tags is initiated by selecting the **Print Tags** button at whatever point in time the user deems appropriate. If instead you wish to be prompted after every XX items are entered, select this check box and specify the number of items in the **Every __ Items** field.
Filter Tags on the Current User	Activating this option causes price tags to be printed only for items entered by the user currently logged in. This can be useful when multiple users, on separate workstations on a network, are all entering items in the same account. For example, User 1 might add items 1, 3, 6, 7, 9 and 13, User 2 items 2, 4 and 12, and User 3 items 5, 8, 10, and 11. If this option were not activated, each user would have to run the Print Price Tags routine multiple times to print tags just for the items he or she entered. With this option activated, when a user prints tags, price tags will be printed only for items entered by that user. Using the example above, when User 1 selects **Task** → **Print** → **Price Tags** and prints her tags, only items 1, 3, 6, 7, 9 and 13 will have tags printed.
Differential Percentage for Trade Items	Set this option when using the Trade Purchase Method during Item Entry. The Cash Value Percentage of Trade Items is increased by this percentage to calculate the Trade Value. For example, if a trade item has a price of $10 and a Cost of $5 (the Cash Value) and the Differential Percentage for Trade Items is set to 15%, the Trade Value of the item is calculated to be $6.50.

3. Make changes to the default fields as required. See the table below for a description of each field.
4. When finished, click on the **Save** button.

Note: *These defaults are global settings. In other words, they affect all new accounts. Changing a global default setting such as these will have no affect on existing*

accounts. It will only affect accounts created after the change is made.

The Price Code, Payment Code, Form of Acquisition, and Set New Accounts to Allow Donate defaults are also controlled by a local setting as well. By local we mean that each individual account has its own default setting, which overrides the global default.

Example: Let's say your store policy states that items that do not sell may be donated to charity. Accordingly you place a check mark in the Global Default in the Set New Accts to Allow Donate field to set the default for all new accounts to be yes, unsold items from this account may be donated.

At some point in time a client may come in and state that she will happily consign items with your store, but only on the condition that all unsold items be returned to her if they do not sell. In this case, it would make sense to lookup her account, go to the 6. Add'l Info screen, and remove the check from the Allow Donate check box. Doing so will help ensure that any of this clients' items that do not sell will not be donated, because if a user attempts to donate one of her items, a message will appear on screen informing the user that items from her account are not allowed to be donated.

Related Topics

Accounts Overview

Additional Info

SET ITEM ENTRY FIELD PREFERENCES

Inventory Module → *Item Entry Window* → *Task* → *Edit Layout*

Both the One of a Kind and Retail Item Entry windows are highly customizable. The **Edit Layout** routine allows you to customize them in the following ways:

- Change the **order** in which fields appear on screen, and
- Specify which fields the cursor lands in as you press the **<Enter>** or **<Tab>** keys, and

which fields are **skipped**. (Skipped fields are still accessible by clicking the mouse on them.)

Example: Let's assume you have reviewed the purpose of the various fields in the One of a Kind Item Entry screen and decided the following with regard to the fields available:

Fields Always or Usually Used	Fields Rarely Changed or Used	Fields Never Changed or Used
Title	Cost/Net	Store Section
Description	Tag Quantity	Tag Color
Price	Allow Donate	Website
Retail Price	Quantity	Marketplace
Price Code	Item Fee	Location
	Tax Code	Custom Fields 1-5
		Auction Account
		Duration
		Starting Bid
		Reserve
		Sub-Title

Based on the decisions made above, it makes sense to do the following:

1. Reorder the fields so those that are always used are at the top of the screen, those that are rarely used or changed are in the middle of the screen, and those never changed are at the bottom of the screen, and
2. Program the cursor to skip over the rarely and never used fields so that the **Save** button is highlighted after entering the Price Code. (There are 2 reasons for doing this:
    a. You won't have to press <Enter> repeatedly after every item is entered to get to the **Save** button (remember, Item Entry is a keyboard centric operation – every time you take your hands off the keyboard and use the mouse slows you down), and
    b. If you ever do need to change a field, for instance, you want to enter a Preset Net in the **Cost/Net** field, then in these rare circumstances you **will** use the mouse.

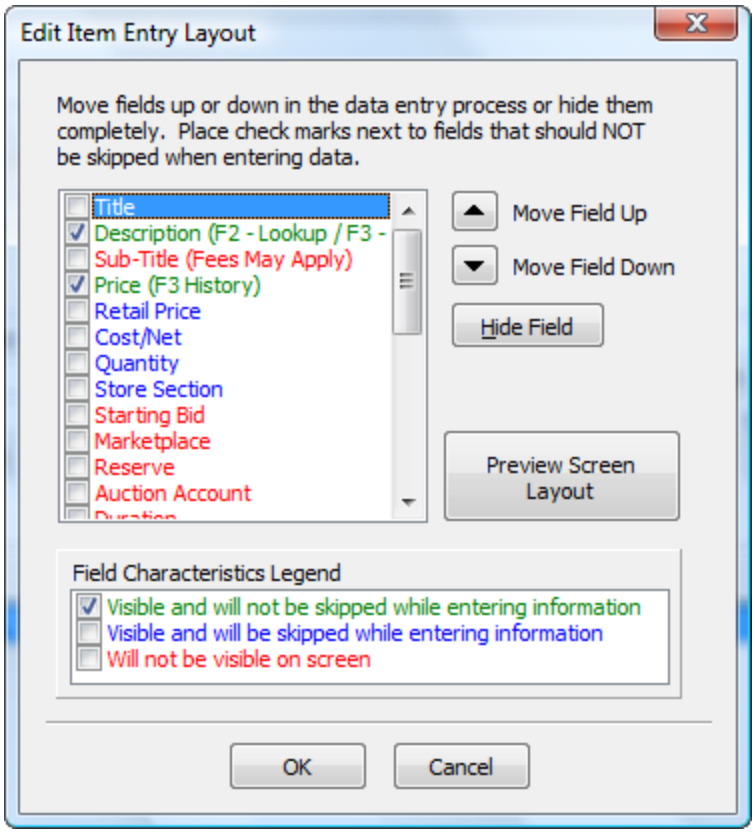
Use the following instructions to reorder the fields and program the cursor to skip fields that are rarely or never changed or used.

Copyright 2010, Resaleworld.com, Inc.

To Set the One of a Kind Item Entry Window's Preferences:

1. From the One of a Kind Item Entry window, select **Task** → **Edit Layout**, or

   Right-click anywhere below the Category field on the Item Entry screen. The **Edit Item Entry Layout** dialog will display.


Edit Item Entry Layout
Move fields up or down in the data entry process or hide them completely. Place check marks next to fields that should NOT be skipped when entering data.
Title
Description (F2 - Lookup / F3 -
Sub-Title (Fees May Apply)
Price (F3 History)
Retail Price
Cost/Net
Quantity
Store Section
Starting Bid
Marketplace
Reserve
Auction Account
Move Field Up
Move Field Down
Hide Field
Preview Screen Layout
Field Characteristics Legend
Visible and will not be skipped while entering information
Visible and will be skipped while entering information
Will not be visible on screen
OK
Cancel

2. Place a check in the box of each field you wish the cursor to land in as you press the **<Enter>** or **<Tab>** key. Fields that you do not wish the cursor to land in should have the check box empty.

   The **Field Characteristics Legend** at the bottom of the window indicates what the different colored text means for each setting, such as whether or not the field will be visible or if the field will be skipped while entering information.

3. Change the order in which the fields are listed by first highlighting the field name, then clicking on either the **Up** or **Down Arrow** button on the right side of the Edit Layout dialog to move the field up or down. The order in which the fields are listed is the order in which they will appear in the Item Entry screen.

4. To hide a field, so that it does not appear on screen, highlight the field then select the **Hide** button. (To unhide a field, highlight the hidden field and click theShowbutton.)

5. Click the **Preview Screen Layout** button to preview your changes to the Item Entry

Copyright 2010, Resaleworld.com, Inc.

screen before the changes are applied.

6. Select **OK** when finished making changes.

To Set the Retail Item Entry Window's Preferences:

1. From the **Retail Item Entry** window, select **Task** → **Edit Layout**. The **Edit Layout** dialog will appear.
2. Follow the same steps 2-5 from the instructions above on setting One of a Kind Item Entry Window Preference's.

Related Topics

Item Entry Windows - Overview

Add One of a Kind Items

One of a Kind Item Entry Window

Retail Item Entry Window

SET UP TRANSACTION TYPES

Inventory Module → *Tools* → *Maintain* → *Transaction Types*

Transactions in Liberty are defined as either *a deduction from*, or *a credit to*, a consignor's account. The **Maintain Transaction Types** window displays a list of all deductions and credits contained within Liberty. From here the type of transaction (deduction or credit) is specified along with the General Ledger (G/L) Account and Account Type for each Transaction Type.

> ***Note**: The G/L information is used when linking with an accounting package such as QuickBooks.*

***Note**: Fees assessed to customers (i.e. buyers or purchasers) are handled in the Order Manager under **Tools** → **Maintain Fee Types**.*

While a number of Transaction Types are provided with Liberty, additional Transaction Types may be entered. Repair, cleaning, and dry cleaning fees are examples of transactions you might wish to create to deduct money from consignor accounts. Credits may also be created for the purpose of adding money to a consignor's account.

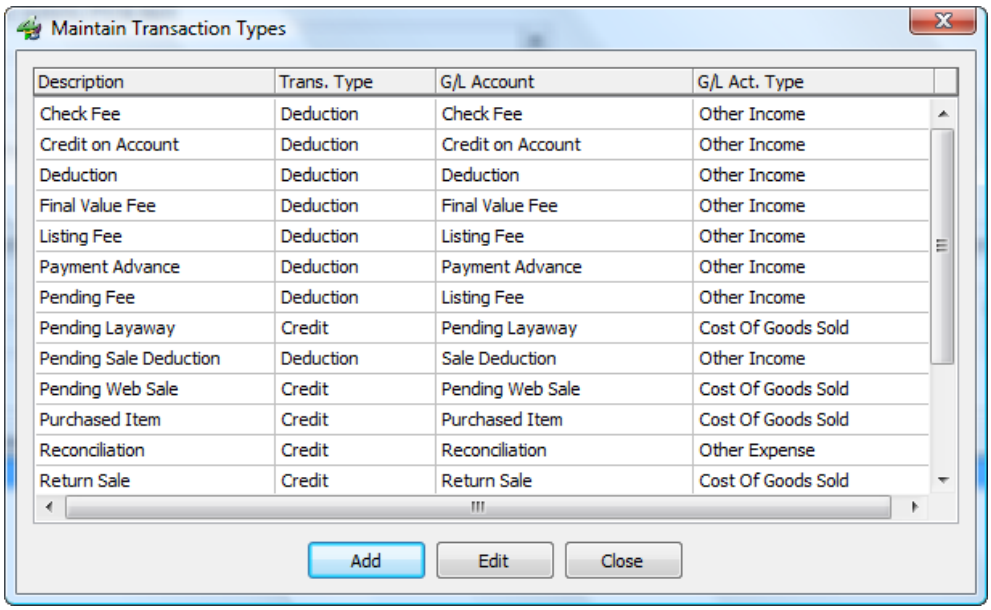
One Transaction Type to be familiar with is **Payment Advance**. Use Payment Advance when making a partial payment to an Account Holder. For instance, if an Account Holder is owed $50.00, and you wish to pay $20.00 instead, use Payment Advance as the Transaction Type.

You may add as many Transaction Types as you wish. It is recommended that separate Transaction Types be created for each type of deduction and credit. For example, if your store has three types of fees to be added - Dry Cleaning, Repair, and Pickup - then you should create 3 separate Transaction Types, one for each (as opposed to just one transaction to cover all three). The reason for this is that you will then be able to generate reports that break out each type of Fee on a separate line. This will allow for more precise cash flow analysis.

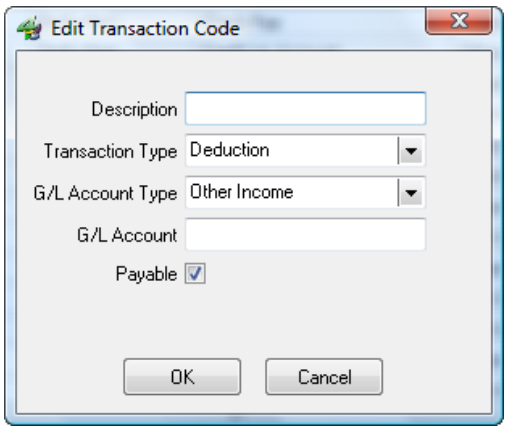
***Note**: For audit control purposes, Transaction Types can only be deleted if they have never been used in a Transaction.*

Add a Transaction Type:

1. From the Liberty Inventory Main menu, select **Tools** → **Maintain** →**Transaction Types**. The **Maintain Transaction Types** window will display:


Maintain Transaction Types
Description
Trans. Type
G/L Account
G/L Act. Type
Check Fee Deduction Check Fee Other Income
Credit on Account Deduction Credit on Account Other Income
Deduction Deduction Deduction Other Income
Final Value Fee Deduction Final Value Fee Other Income
Listing Fee Deduction Listing Fee Other Income
Payment Advance Deduction Payment Advance Other Income
Pending Fee Deduction Listing Fee Other Income
Pending Layaway Credit Pending Layaway Cost Of Goods Sold
Pending Sale Deduction Deduction Sale Deduction Other Income
Pending Web Sale Credit Pending Web Sale Cost Of Goods Sold
Purchased Item Credit Purchased Item Cost Of Goods Sold
Reconciliation Credit Reconciliation Other Expense
Return Sale Credit Return Sale Cost Of Goods Sold
Add
Edit
Close

2. Select the **Add** button. The **Edit Transaction Code** dialog will display:



3. Enter a **Description** for the Transaction Type. This description will appear in the **Transaction History**. Examples would include Dry Cleaning or Repair Fee. Do not use the term **Deduction** - this term is reserved for system use.
4. Select the **Transaction Type** – Deduction or Credit – from the drop-down list.
5. In the **G/L Account Type** field, select the type of account from the choices provided in the drop-down menu.

   Note: *Your selection is dependent upon the way your accounting software is set up and whether the Transaction Type is a deduction or credit.*

6. If you are using accounting software with Liberty, enter the appropriate General Ledger (GL) account number in the **G/L Account** field.
7. Put a check in the **Payable** check box. The only time you do not put a check in the Payable check box is when you create a Transaction Type that you do not want to affect the payable balance.

   Example: A customer returns a purchase. Instead of giving the customer a refund you give store credit. This is done by entering a transaction in the customer's account that adds money to the account (a credit). By using a Transaction Type that is not payable, the amount added to the customer's account credit will never be paid to the customer in the form of cash or check - the customer can only use the money as store credit.

8. Click the **OK** button.

Related Topics

View Transaction History

Payouts Overview

View Payout History

Set Up Auction Fee Types

Copyright 2010, Resaleworld.com, Inc.

QuickBooks Link Module

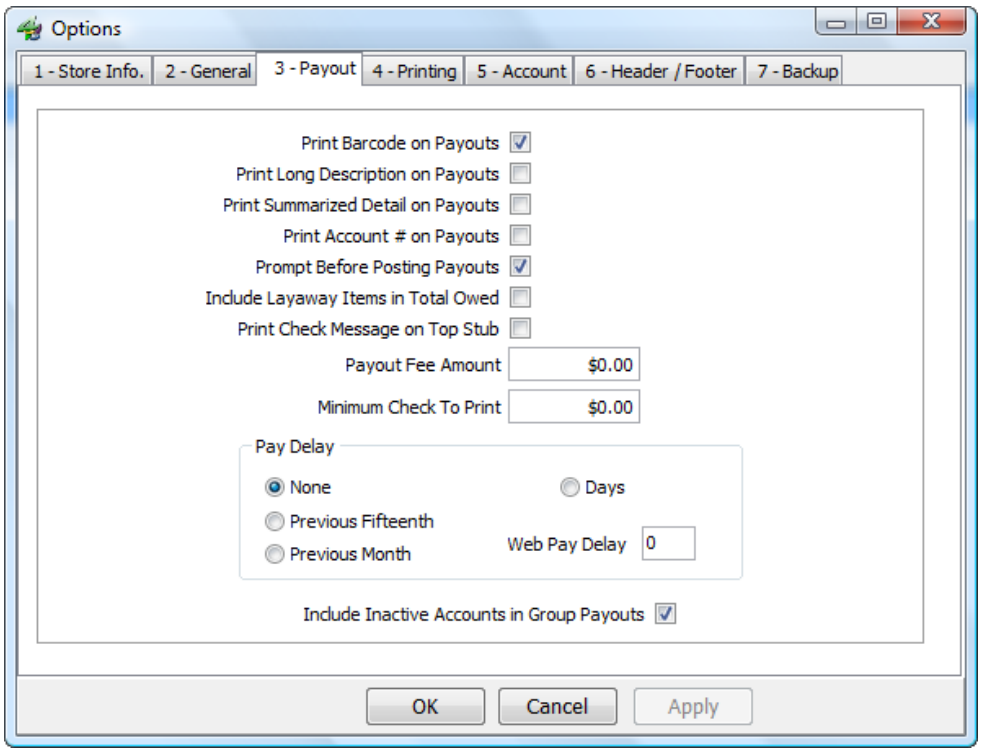
SET PAYOUT PREFERENCES

Inventory Module → Tools → Options → Payout Tab

The term **Payment Defaults** refers to consignor payouts.

To Set Payment Defaults:

1. From the Main Menu, select **Tools** → **Options**.
2. Click on the **3. Payout** tab. The Payout Defaults window will display:



Payout Tab Fields on Options Window

Print Bar Code on Checks	Check to include a bar code on client checks. The bar code is used to Clear Checks after they are cashed.
Print Long Description on Checks	Check to print a longer, more detailed description of each item sold on checks. The consequence is fewer items can be described per check. When there is not enough room to print information for every item being paid, there is no indication given on the check that there are more items. As a result the items listed will not add up to the amount paid.
Print Summarized Detail on Payouts	Choose this option to summarize item information rather than show detailed information on checks and cash payout statements.
Print Account # on Checks	Check to print account number on checks.
Prompt Before Posting Checks	Check to be prompted before posting checks as paid. It is recommended that this option be left turned on.
Include Layaway Items in Total Owed	Checking this option will cause consignors to be paid for items on layaway before the layaway is finished. Realize that checking this option means the consignor will be paid for the full amount of the sale, regardless of whether the customer pays for the layaway purchase in full or not.
Print Check Message on Top Stub	Check this option if the check message should be printed on the top stub of the check rather than the bottom stub.
Payout Fee Amount	Enter how much (if any) you will charge a client for issuing a check.
Minimum Check to Print	Enter the smallest amount for which the system should print checks.

Pay Delay

None	Select to allow clients to be paid any time after an in-store sale is made.
Previous Fifteenth	Select to issue payments for in-store sales made up through the 15th day of the previous month.
Previous Month	Select to issue payment for in-store sales made up to the last day of the previous month.

Copyright 2010, Resaleworld.com, Inc.

Days	Select and enter the number of days before a client can be paid after and in-store sale is made.
Web Pay Delay	Enter the number of days before a client can be paid after an item sells online. Note that the amount entered is added to the regular pay delay. **Example:** Regular pay delay is set to 10 days. Web Pay Delay is set to 5 days. Account holders will not be paid for items that sell online for 10+5=15 days.

3. Make changes to the default fields as required.
4. When finished, click on the **Save** button.

Related Topic

Payouts Overview

OVERVIEW OF ATTRIBUTES

Inventory Module ➔ *Tools* ➔ *Category Editor* ➔ *Attributes Tab & Categories Tab*

An **Attribute** is a characteristic or feature which helps describe an item. For instance, *color* and *fabric* help describe clothing, *material* and *era* help identify antiques. Attributes are assigned to Categories, and each Category may have one or more Attributes assigned to it. Attributes are entered in the **Attribute Panel**, which is located in the Item Entry screen.

Attributes are not required: general information describing items may be entered into the Description field instead. There are, however, significant benefits to using Attributes, particularly faster and more consistent data entry.

Item Entry is faster and more consistent when Attributes are used because Attribute Values auto-fill when they are entered. For example, instead of typing the Attribute Value *cotton* it is only necessary to type *co* or *cot*. A couple of keystrokes may seem minor, but when added up can make quite a difference. As time goes on, users become better and better at using these shortcuts. Poor typists find Auto-fill especially helpful.

Copyright 2010, Resaleworld.com, Inc.

Consistent data entry makes reports more effective, particularly the Wish List, Lost Tag, Sales, and Inventory reports. Consistency makes it easier to generate useful information, find items on the floor, and manage business in general.

Example of consistent and inconsistent data entry:

Consistent: the color BLACK is always spelled ***BLACK***.

Inconsistent: the color BLACK is spelled ***BL***, ***BLK***, ***BLAK***, ***BLACK***, etc.

Liberty comes with 1-3 Attributes already set up for most Categories. In addition there are several dozen Attribute Types already set up in the Attribute Editor, and anywhere from 10-100 Attribute Values for each Attribute Type.

Think of Attribute Value as a subset of Attribute Type (similar to Category 3 being a subset of Category 2). For instance, *Color* is an Attribute Type, and has the Attribute Values of *red, green, blue, brown, beige*, etc. Another example: Attribute Values for the Attribute Type *Gemstone* include *diamond*, *ruby*, and *emerald*.

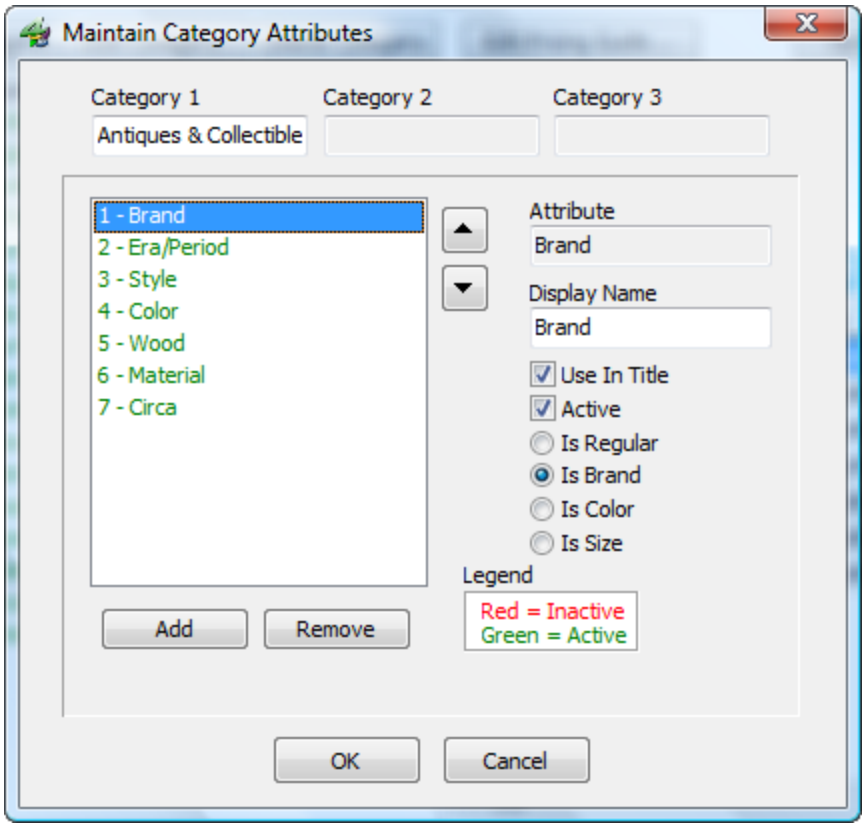
Attribute Types and Values may be changed as needed. Once used, Attribute Types and Values may not be deleted.

Below is the **Maintain Category Attributes** dialog. To view this dialog on screen:

1. Select **Tools** → **Category Editor**.
2. Navigate to and then highlight the Category you wish to edit Attributes for.
3. Click the **Edit Category - Attribute Associations** button, which is located on the right

Copyright 2010, Resaleworld.com, Inc.

side of the dialog.



Note the following about the **Maintain Category Attributes** dialog (below):

1. **Size Attributes** should always be entered with the **Is Size** radio button selected. Selecting the Size radio button causes the word Size to be printed on the Price Tag or Label, followed by the Size entered for the item. See the section entitled Printing the Size Attribute on Price Tags for more details.
2. **Brand Attributes** should always be entered with the **Brand** radio button selected.
3. **Color Attributes** should always be entered with the **Color** radio button selected.
4. Attributes that are to be listed in the Item's Title should have a check mark in the **Use in Title** check box.

Related Topics

Assign Attributes Types to Categories

Add, Change, and Delete Attribute Types

Add, Edit, and Delete Attribute Values

Printing the Size Attribute on Price Tags

Show Attributes in Item Titles

Copyright 2010, Resaleworld.com, Inc.

Assign Attributes Types to Categories

Inventory Module → *Tools* → *Category Editor* → *Attributes Tab*

When an **Attribute Type** is assigned to a Category, the Attribute will appear in the Attributes Panel. The Attributes Panel is part of the Item Entry screen, and appears after a Category is selected.

Attributes may be assigned at any Category Level - 1, 2, or 3. When an Attribute is assigned to a Level 1 Category, the Attribute Cascades to that Level 1 Categories' Level 2 and Level 3 Categories. This means the Level 2 and 3 Categories Inherit Attributes from the Level 1 Category of which they are a sub-category.

When an Attribute is assigned to a Level 2 Category, that Attribute Cascades to its Level 3 (sub)Categories.

> ***Note:*** *It is only necessary to assign an Attribute Type to one Level in a particular Category. Do not assign an Attribute to more than one Category Level for a particular Category.*

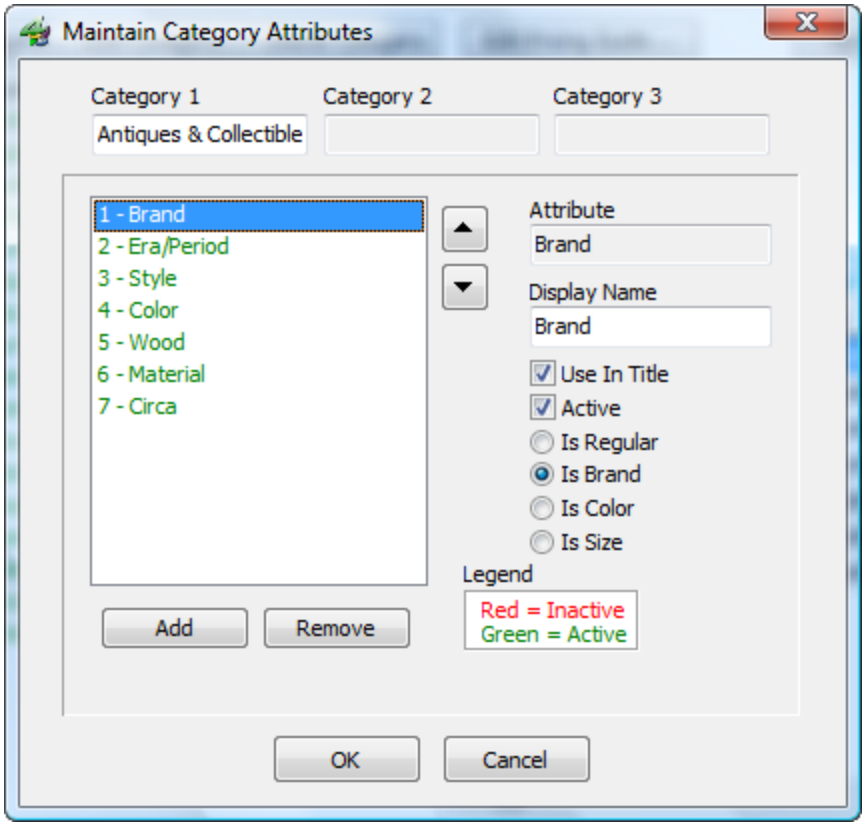
Example: Women's Apparel Sizes provides a good example of why one would choose to assign Attributes at a level other than Category Level 1. Dresses, Pants, and Tops may all use pretty much the same set of sizes, but shoe sizes are a different matter. Assigning the Attribute **Women's Size** to Dress, Pants, and Tops at Level 2, and **Women's Shoe Size** to Shoes at Level 2 lets you limit the number of Sizes appearing in each Size list when entering items. In other words, when entering Dresses, which have sizes like 2, 4, 6, 8, 10, 12, 14, 16, 18, 20 etc. you're not also looking at shoe sizes such as 4.5, 5, 5.5, 6, 6.5, 7, 7.5, etc.

Assign an Attribute to a Category

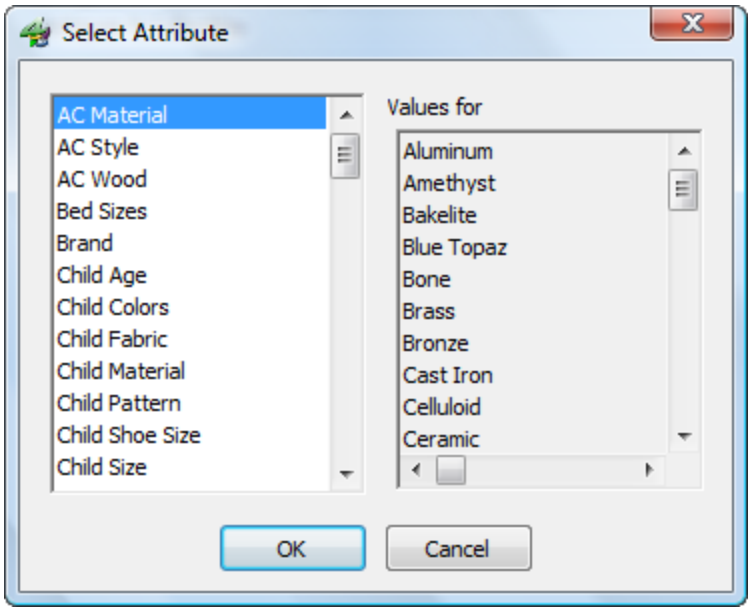
1. From the **Main menu**, select **Tools** → **Category Editor**. You are now on the **Category** tab of the **Category Editor**.
2. In the Category Editor, highlight the Category to which you wish to assign the Attribute.

Copyright 2010, Resaleworld.com, Inc.

3. Select the **Edit Category-Attribute Association** button, which is on the right side of the dialog about half way down. The **Maintain Category Attributes** dialog will display:



4. Select the **Add** button. The **Select Attribute** dialog will display:



5. Select the Attribute Type from the list on the left side of the dialog that you wish to associate with the Category selected in step 2. (The list on the right side of the dialog shows

Copyright 2010, Resaleworld.com, Inc.

the Attribute Values for the selected Attribute Type.) Select the **OK** button.

6. Repeat steps 4 and 5 as necessary until you have selected all desired Attribute Types.
7. Use the Priority List buttons to change the order of the Attributes as they appear in the Attribute List. The order of Attributes in the Attribute List will be the order of Attributes in the Attribute Panel, so you should list frequently used Attributes before those that will be used less frequently.
8. Select **OK** in the **Maintain Category Attribute** dialog when finished.

Definitions of Attributes Fields and Buttons

Category 1, 2 & 3	Shows the Categories to which Attribute Types are associated. The currently active Category Level is listed in black print over white background.
Attribute List	Shows which Attributes are associated with the selected Category, and the order in which the Attribute will appear in the Attribute Panel.
Priority List Buttons	Use these buttons to place Attributes in their preferred order.
Attribute	The Attribute's name.
Display Name	Name of Attribute as it will appear in the Item Entry screen. Change the name of the Attribute here if you wish the Attribute to appear with a different name in the Attribute Panel.
Use In Title	Checking this box causes the Attribute to appear as part of Items' Titles.
Active	Check this box to make an Attribute Active. Remove the check to make an Attribute Inactive. (Attributes cannot be removed from a Category once they have been assigned and used. They can only be made Inactive.)
Is Regular, Is Brand, Is Color, & Is Size Radio Buttons	Select the appropriate description for what the Attribute describes by choosing one of these radio buttons. "Is Regular" is the default setting. Choose "Is Size" to make the attribute print on price tags and labels. Choose "Is Color" and "Is Brand" when appropriate.
Add Button	Select to make an Attribute appear in the Attributes Panel for the selected Category. Upon selecting, the select Attribute dialog will appear.

Copyright 2010, Resaleworld.com, Inc.

Remove Button	Select to remove the selected Attribute appear in the Attributes Panel for the selected Category. Upon selecting the highlighted Attribute in the Attribute List will be removed. (This does not delete the Attribute.)

For information on adding your own, specific Attributes and Values, please see the sections entitled Add, Change, and Delete Attribute Types and Add, Edit, and Delete Attribute Values.

Related Topics

Overview of Attributes

Categories Overview

The Category Editor

Remove an Attribute from a Category

Inventory Module ➔ *Tools* ➔ *Category Editor*

Attribute Types may be removed from use by a Category so long as the Attribute has not been used to describe an item. If an Attribute has been used to describe an item, you may not remove (Delete) the Attribute: you may make the Attribute Inactive instead. See Make an Attribute Inactive for information on how to make an Attribute Inactive.

To Remove an Attribute from Use by a Category:

1. Select **Tools** ➔ **Category Editor**.
2. Highlight a Category containing the Attribute to be removed.
3. Select the **Edit Category-Attribute Associations** button.
4. Highlight the Attribute to be removed in the Attributes List.

Copyright 2010, Resaleworld.com, Inc.

5. Select the **Remove** button.
6. Select **OK**.

Related Topics

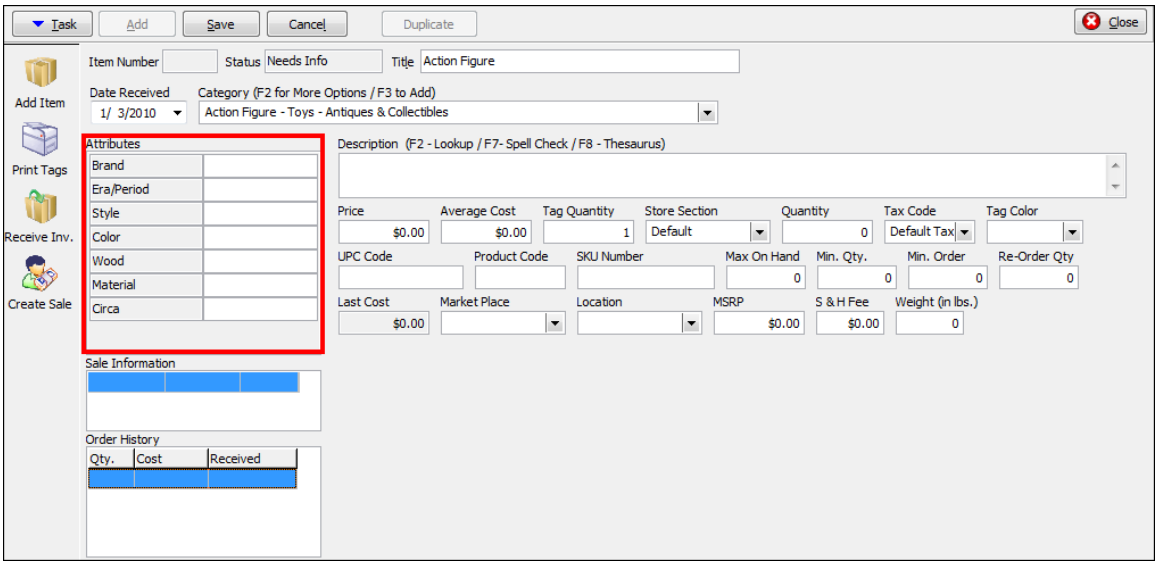
Overview of Attributes

Categories Overview

The Category Editor

ATTRIBUTE PANEL

The **Attribute Panel** contains a list of Attributes for a particular Category. It is found in the Item Entry window below the Date Received field. Attributes are listed in order of the Priority they are given in the Attribute Settings dialog, which is found in the Category Editor.



Attribute Types & Values

Think of Attribute Value as a subset of Attribute Type (similar to Category 3 being a subset of Category 2). For instance, an Attribute Type might be "Color", which has the Attribute Values of red, green, blue, brown, beige, etc.

Another example: The Attribute Type of "Gemstone" has the Attribute Values of diamond, ruby, and emerald.

Definition of Inherit

When an Attribute Type is assigned to a Level 1 Category, then all Level 2 and 3 Category's will have Color appear in the Attribute Panel. This is because these Level 2 and 3 Categories **Inherit** that Attribute from the Category 1. Inherit is the opposite of Cascade.

Inheritance is one way only:

1. A Level 3 Category inherits from the Level 1 and 2 Categories above it.
2. A Level 2 Category inherits from the Level 1 Category above it, but not from any of its Level 3 Categories.
3. Level 1 Categories do not inherit any Attributes.

Example: the Attribute Type *Color* is assigned to the Level 1 Category Women's Apparel. All Category 2's (Dresses, Pants, etc.) and 3's (Boots, Sweaters, etc.) below Women's Apparel **Inherit** the Attribute Type of Color.

For convenience, inheritance is shown in the Category Editor. Look on the Category tab in the Category - Attribute area, which is located in the lower right part of the dialog.

Copyright 2010, Resaleworld.com, Inc.

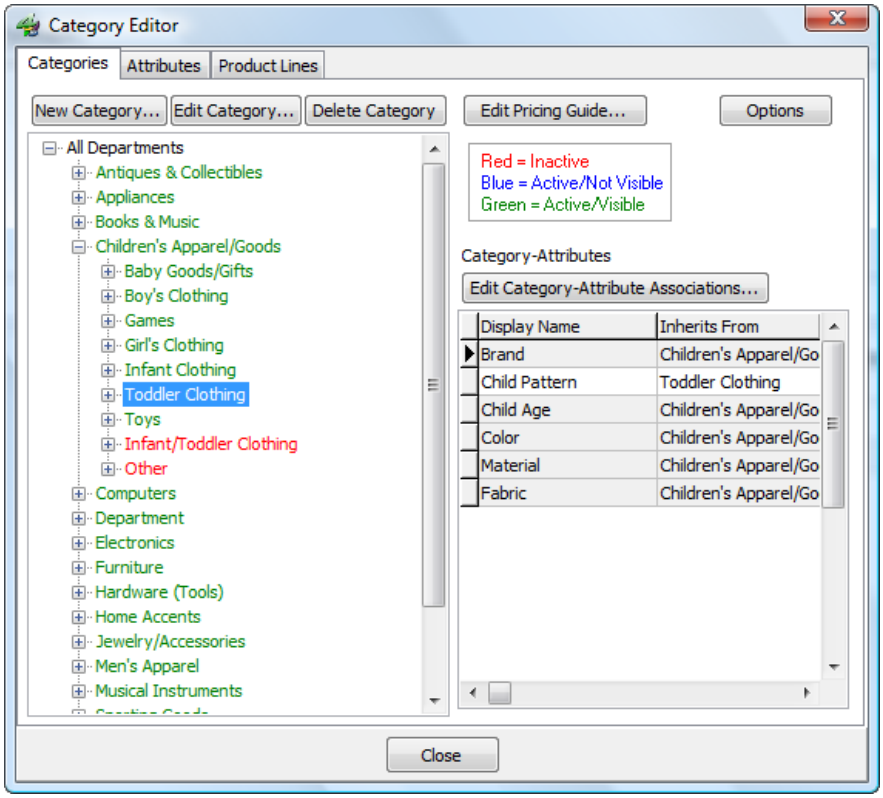
Printing the Size Attribute on Price Tags

Inventory Module → *Tools* → *Category Editor* → *Attributes Tab & Categories Tab*

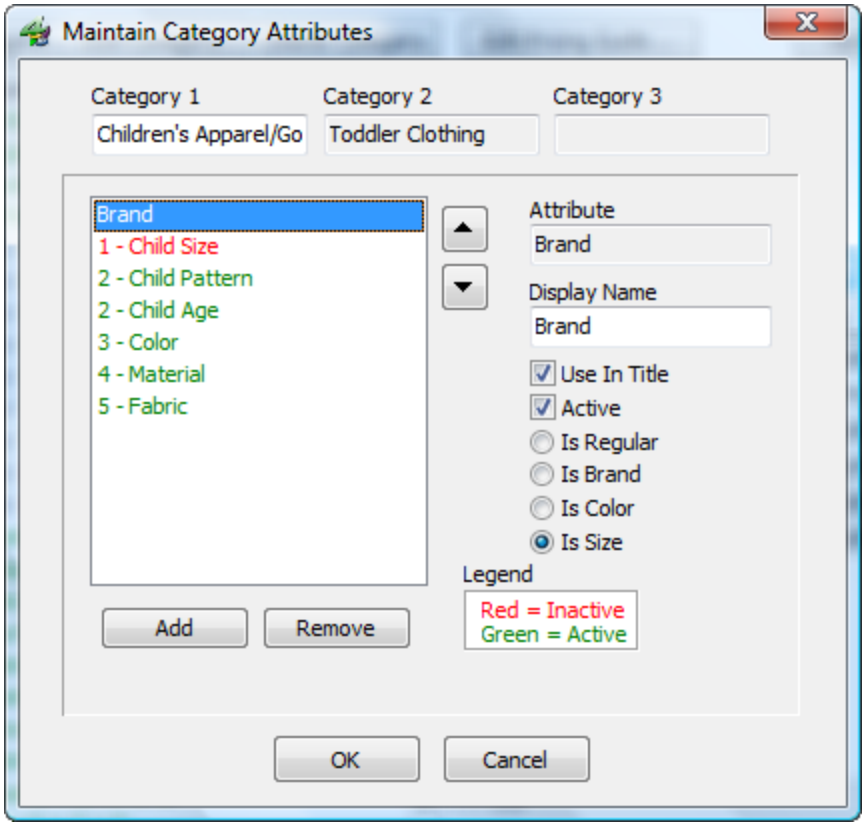
It is usually necessary to show the size of an item prominently on the price tag. Shown below is an example of a price tag with Size printed in large print. (***Note:*** *This price tag is just for illustration purposes only. Price tags printed by Liberty come in a variety of sizes and layouts.*)

To Make The Size Appear In Large, Bold Print After The Word *SIZE* On Price Tags:

1. Select **Tools** → **Category Editor**.
2. If necessary, assign or create the Size Attribute to the necessary Category or Categories. See Assign Attributes Types to Categories for more information.
3. Highlight the Category to which the Size Attribute is to be assigned (see sample figure, below).



4. Select the **Edit Category-Attribute Associations** button. The **Maintain Category Attributes** dialog will display (see the sample figure, below).
5. Highlight the **Size Attribute** in the **Size list**.
6. Click on the **Is Size** radio button.



7. Make sure the **Active** check box contains a check.
8. Make sure the Display Name field says the word **Size** exactly. It must not say anything else, or the Size will not print on the tag.
9. Select **OK**.

Related Topics

Print Price Tags and Price Labels

Overview of Attributes

The Category Editor

Change Order of Attributes on the Item Entry Screen

Inventory Module ➔ *Tools* ➔ *Category Editor*

You may control the order in which Attributes appear in the Item Entry screen.

To Change the Order in which Attributes Display in the Attribute Panel of the Item Entry Screen

1. Select **Tools** ➔ **Category Editor**.
2. Highlight the Category for which you wish to change the order of Attributes.
3. Select the Edit Category-Attribute Associations button.
4. Use the Priority List Buttons (buttons with Up and Down Arrows) to reorder the Attributes.
5. Select **OK** when finished.

> ***Note:*** *The numbers in front of each Attribute do not need to be in perfect order.*

Related Topics

Overview of Attributes

Add, Change, and Delete Attribute Types

Assign Attributes Types to Categories

Copyright 2010, Resaleworld.com, Inc.

Add, Change, and Delete Attribute Types

Inventory Module → *Tools* → *Category Editor* → *Attributes Tab*

Liberty comes with 1-3 Attributes already set up for most Categories. In addition there are several dozen Attribute Types already set up, and anywhere from 10-100 Attribute Values for each Attribute Type.

Think of Attribute Value as a subset of Attribute Type (similar to Category 3 being a subset of Category 2). For instance, an Attribute Type might be Color, which has the Attribute values of red, green, blue, brown, beige, etc.

Another example: Attribute Values for the Attribute Type of Gemstone are diamond, ruby, and emerald.

You may add, change and delete Attributes as needed.

Add or Change an Attribute Type

1. From the Main menu, click on **Tools** → **Category Editor**.
2. Select the **Attributes** tab.
3. Select the **Add Attribute** or **Edit Attribute** button.
4. Enter or change the name of the Attribute Type in the **Attribute Type** dialog. **The maximum length of the Attribute Type is 15 characters.**
5. Select **OK**.

Delete an Attribute Type

Note: *Once an Attribute Value belonging to an Attribute Type has been used to describe an item neither the Attribute Type nor the Attribute Value can be deleted.*

Copyright 2010, Resaleworld.com, Inc.

1. From the Main menu, click on **Tools** ➔ **Category Editor**.
2. Select the **Attributes** tab.
3. Select the **Attribute Type** to be deleted.
4. Select the **Delete Type** button.

Related Topics

Overview of Attributes

The Category Editor

Add, Edit, and Delete Attribute Values

Inventory Module ➔ *Tools* ➔ *Category Editor* ➔ *Attributes Tab*

Liberty comes with 1-3 Attributes already set up for most Categories. In addition there are several dozen Attribute Types already set up, and anywhere from 10-100 Attribute Values for each Attribute Type.

Think of Attribute Value as a subset of Attribute Type (similar to Category 3 being a subset of Category 2). For instance, an Attribute Type might be Color, which has the Attribute values of red, green, blue, brown, beige, etc.

Another example: Attribute Values for the Attribute Type of Gemstone are diamond, ruby, and emerald.

You may add, change and delete Attributes as needed.

Add or Edit an Attribute Value

1. From the Main menu, click on **Tools** ➔ **Category Editor**.
2. Select the **Attributes** tab.

Copyright 2010, Resaleworld.com, Inc.

3. On the right side of the dialog, select the **Add Value** or **Edit Value** button.
4. Enter or change the name of the Attribute Value in the **Attribute Value** dialog. **The maximum length of an Attribute Value is 20 characters.**
5. Select **OK**.

Add a New Attribute Value While in the Item Entry Screen

1. In the **Item Entry** screen, place the cursor in the **Attribute** field.
2. Press the **<F2>** key.
3. Enter the new **Attribute Value** in the dialog.
4. Click **OK**.

Delete an Attribute Value

Note: *Once an Attribute Value has been used to describe an item it can not be deleted.*

1. From the Main menu, click on **Tools** → **Category Editor**.
2. Select the **Attributes** tab.
3. Select the **Attribute Type** which contains the **Attribute Value** to be deleted.
4. Highlight the **Attribute Value** to be deleted.
5. Select the **Delete Value** button.

Related Topics

Overview of Attributes

The Category Editor

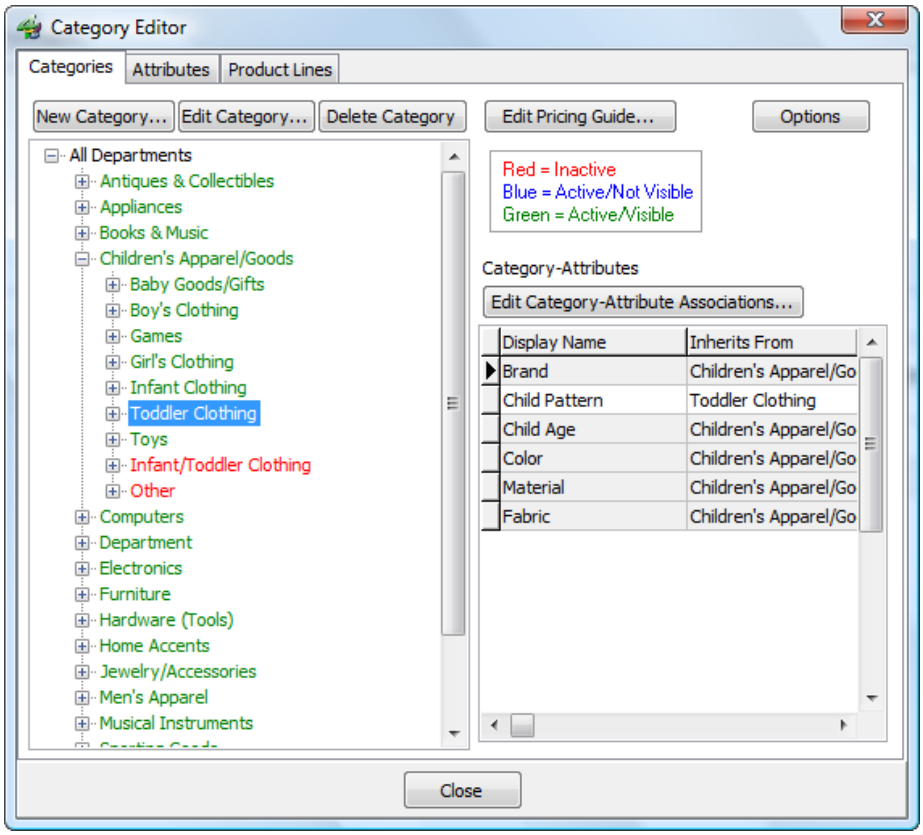
Show Attributes in Item Titles

Inventory Module → *Tools* → *Category Editor*

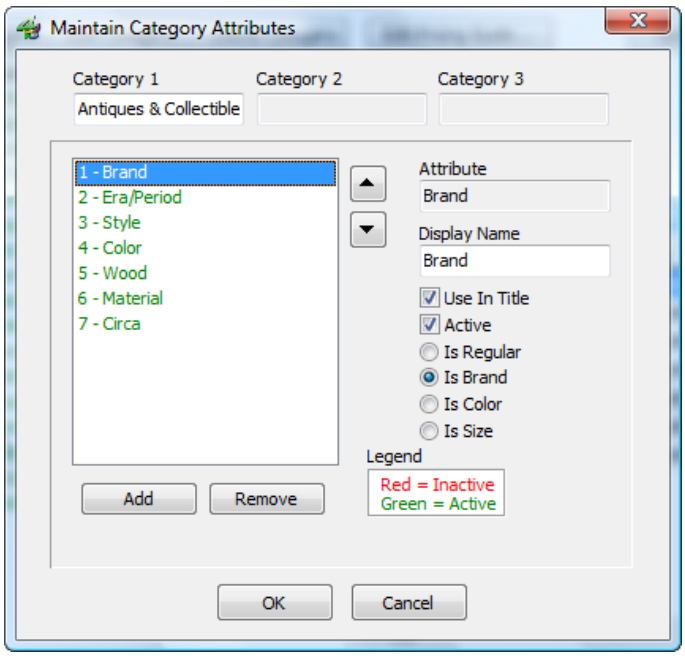
You may specify which Attributes are included in Item Titles.

Make an Attribute Part of the Item Title:

1. Select **Tools** → **Category Editor**. The Category Editor dialog displays.



2. Select the Category containing the Attribute you wish to include in the Item Title.
3. Select the **Edit Category-Attribute Associations** button. The Maintain Category Attributes dialog displays.



4. Highlight the Attribute to be included in the **Item Title** in the list of Attributes.
5. Put a check in the **Use in Title** check box.
6. Select **OK** when finished.

Related Topics

Overview of Attributes

Item Entry Windows - Overview

Add One of a Kind Items

MAKE AN ATTRIBUTE INACTIVE

Inventory Module ➔ *Tools* ➔ *Category Editor*

Once an Attribute has been used to describe an item it cannot be deleted. Attributes may, however, be made **Inactive**. Making an Attribute Inactive cause the Attribute to not appear in the Attributes Panel in the Item Entry screen.

> ***Note:*** *Making an Attribute Inactive makes it Inactive for all Categories, not just the Category you are in when you make it Inactive.*

To Make an Attribute Inactive:

1. Select **Tools** ➔ **Category Editor**.
2. Highlight the Category containing the Attribute you wish to make Inactive.
3. Select the **Edit Category-Attribute Associations** button.
4. Highlight the Attribute to be made **Inactive** in the list of Attributes.
5. Remove the check from the **Active** check box.
6. Select **OK**.

Related Topics

Remove an Attribute from a Category

Overview of Attributes

The Category Editor

SET UP PAYMENT TYPES

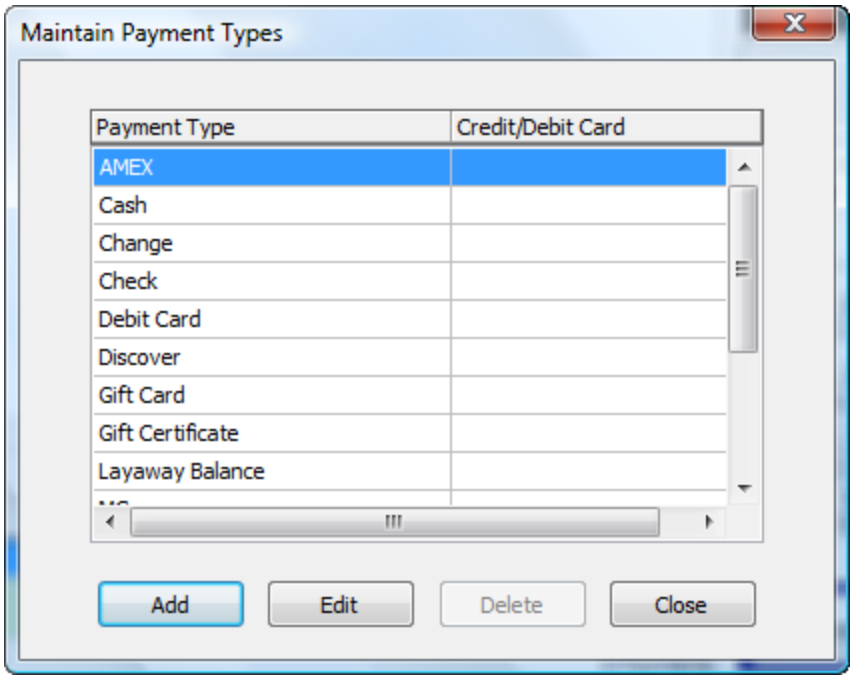
PoS Module ➔ Setup ➔ Maintain Payment Types

Payment Types provided with Liberty include Cash, Check, Visa, Master Card, American Express, Discover, Store Credit, Gift Certificate, etc. Use this procedure to create additional Payment Types for use by your store.

__Note__: Do not add __Coupon__ as a Payment Type. For tax purposes, Coupons represent a deduction from a sale, not a Payment Type.

Add or Edit a Payment Type:

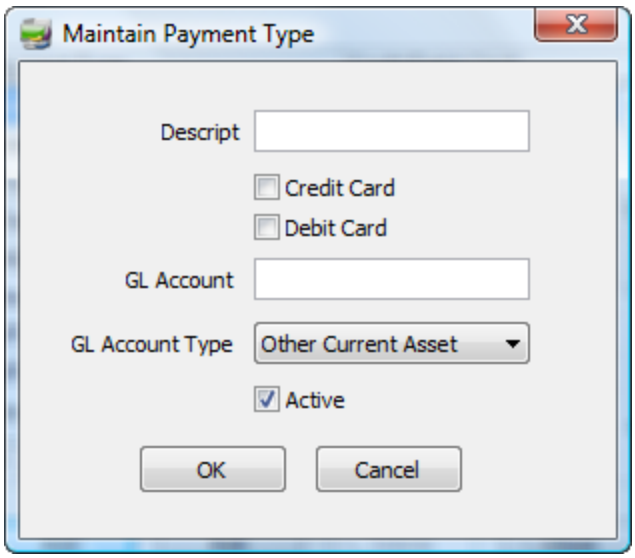
1. From the main menu of Liberty Point of Sale click on **Setup** → **Maintain Payment Types**. The **Maintain Payment Types** window displays.



2. This window lists the available types of payments that can be used for a transaction in the Point of Sale module.

3. Click on the **Add** button to add a new Payment Type, or the **Edit** button to make changes to an existing Payment Type. Either way, the **Maintain Payment Type** window displays.

Copyright 2010, Resaleworld.com, Inc.



4. Enter a label for the payment type in the **Description** field. This label will appear on the button created for this Payment Type on the PoS screen (see below).
5. If you the Payment Type is a credit card, select the **Credit Card** check box. This Payment Type will now use the default credit card software to process payments.
6. If you the Payment Type is a debit card, select the **Debit Card** check box.
7. If you are using accounting software such as QuickBooks and linking it with Liberty (skip this step if you are not):
    a. Enter the appropriate account number in the **GL Account** field, and
    b. Select a **GL Account Type** from the drop-down.
8. Click the **OK** button.
9. The Maintain Payment Types screen will now show the new payment type and if it is a Credit or Debit card.

Once a payment type is added, a button is automatically created on the Point of Sale screen for that payment type. The button is added to the right side of the screen where the other payment type buttons are already located. Note that PoS must be restarted before the button(s) will appear. Note also that once a Payment Type has been used in a transaction it cannot be deleted.

Delete a Payment Type:

Note: *Once a payment type has been used, it cannot be deleted.*

1. From the main menu of Liberty Point of Sale click on **Setup** ➔ **Maintain Payment Types**.

Copyright 2010, Resaleworld.com, Inc.

2. Click on the **Delete** button.
3. Click **OK**.

> ***Note**: Cash, Check, Visa, Master Card, American Express, Discover, Store Credit, and Gift Certificate are System Records and cannot be deleted.*

SET UP FEE TYPES

PoS Module → Setup → Maintain Fee Types

A **Fee Type** can be a charge such as a delivery or shipping fee. It can also be used for items that are not inventoried, such as candy or inexpensive knick knacks sold at the sales counter.

To Create Fee Types:

1. From the main menu of Liberty Point of Sale click on **Setup→Maintain Fee Types**.
2. Click on the **Add** button.
3. Enter a name for the Fee Type in the **Description** field.
4. Enter the appropriate General Ledger (GL) number in the **GL Account** field.
5. Select a **GL Account Type** from the drop-down.
6. Select a Tax Type for the Fee from the **Tax Type** drop down list.
7. Click **OK**.

Related Topic

Post Non Inventory Items

Copyright 2010, Resaleworld.com, Inc.

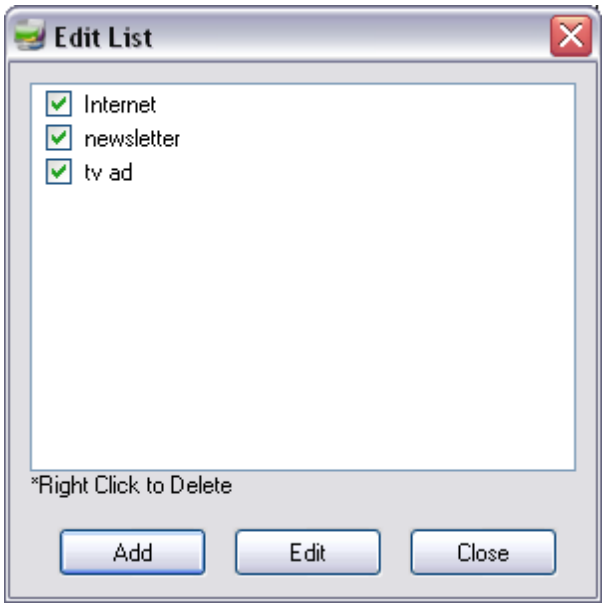
SET UP PROMOTIONS

PoS Module ➔ *Setup* ➔ *Maintain Promotions*

A specific promotion, such as a radio ad or a newsletter, can be tied to a sale. Creating this connection can be useful for determining how effective a particular type of marketing has been.

To Create Promotion Types:

1. From the main screen of Liberty Point of Sale, click **Setup -> Maintain Promotion**.
2. Click **Add** to create a new Promotion.
3. Enter the name of the new Promotion, then click **Ok**.



To Maintain Promotion Types:

The checkbox next to the promotion name on the **Maintain Promotions** screen indicates whether or not the promotion is active. While it is not necessary to deactivate a promotion, it can be helpful to prevent a promotion from being accidentally selected.

For example, it may not make sense to tie a sale to a newsletter mailing several months after the newsletter was sent out. Deactivating the promotion for that newsletter would prevent any sales from being tied to a promotion that has ended.

Copyright 2010, Resaleworld.com, Inc.

It is possible to delete a promotion that has been added in error, as long as it has not yet been tied to a sale. Once a promotion has been used for a sale, it can no longer be removed. The name of a promotion can always be edited, either to correct a typo or to enter a more fitting name.

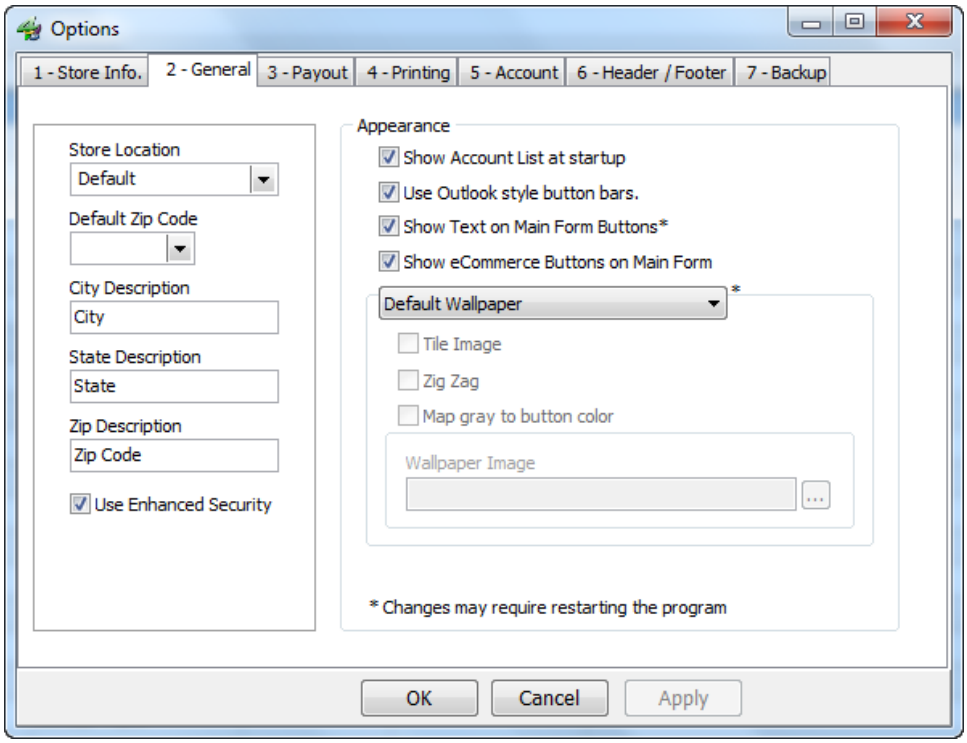
SET UP GENERAL DEFAULTS

Inventory Module ➔ *Tools* ➔ *Options* ➔ *General Tab*

Use this procedure to set up preferences for adding new accounts in Liberty Inventory.

To Set Up General Defaults:

1. From Liberty Inventory's main menu, click on **Tools** ➔ **Options**, and then click on the **2 - General** tab. The General Defaults window will display:



2. Select a default zip code. If no Zip Codes appear:

    a. Enter the desired default zip code in the **Default Zip Code** field and press <Enter>. The New Zip Entry dialog will appear.

    b. Enter the **City** and **State** in the appropriate fields.

    c. Click on the **Save** button.

    d. Click the **Close** button to return to General Defaults.

3. The City, State, and Zip Description text boxes in this window are for international users to customize the field names as they appear in the **New Accounts** dialog box. For example, in **Canada** the State field may be renamed **Province**, and the **Zip** field renamed **Postal Code**.

4. The **Use Enhanced Security** check box is used to turn the advanced security features on or off. Checking this box will activate the security measures detailed here.

    Note: *This option is disabled by default. However, it will be selected automatically if Mercury Payment Systems is set as the default Credit Card Software in the Point of Sale module.*

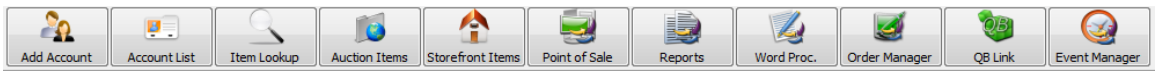
5. The **Appearance** check boxes allow the look of Liberty to be customized to suit your preferences:

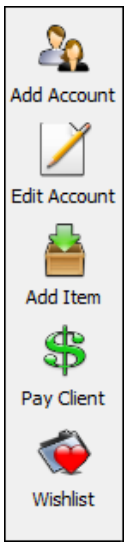
6. When checked, **Show Account List** at startup causes the Account List to automatically appear whenever Liberty is started.

7. When checked, the **Use Outlook style button bars** check box causes icons to appear at the top and the left of the screen. These icons provide a quick and easy way to select the most frequently used routines.

    Note: *these icons change depending on the screen currently in use.*

    Examples of how the button bars look follow:





8. The **Show Text on Main Form Buttons** causes the name of each icon to appear in print.
9. The **Wallpaper** drop-down field allows you to select the wallpaper to appear on the Main Screen. Select one of the three options for the wallpaper: No Wallpaper, Default Wallpaper, or Custom Wallpaper.
10. If you select "Custom Wallpaper", the **Tile Image**, **Zig Zag**, and **Map gray to button color** check boxes are activated. These options allow you to indicate how the selected wallpaper is displayed.
11. The **Wallpaper Image** field allows you to select the image of your choice to use as your wallpaper, such as your store logo. You can select the image to use by either manually entering the path and filename or by clicking the "**...**" button next to the field to browse for it.
12. Click **Apply** when finished.

Related Topics

Add an Account

SET UP ACCOUNT FIELD LAYOUT

Inventory Module → *Task* → *Maintenance* → *Account Field Layout*

Use the **Account Field Layout** routine to customize the fields that appear in the lower half of the **Account** tab and the **Additional Info** tab. With this routine you may:

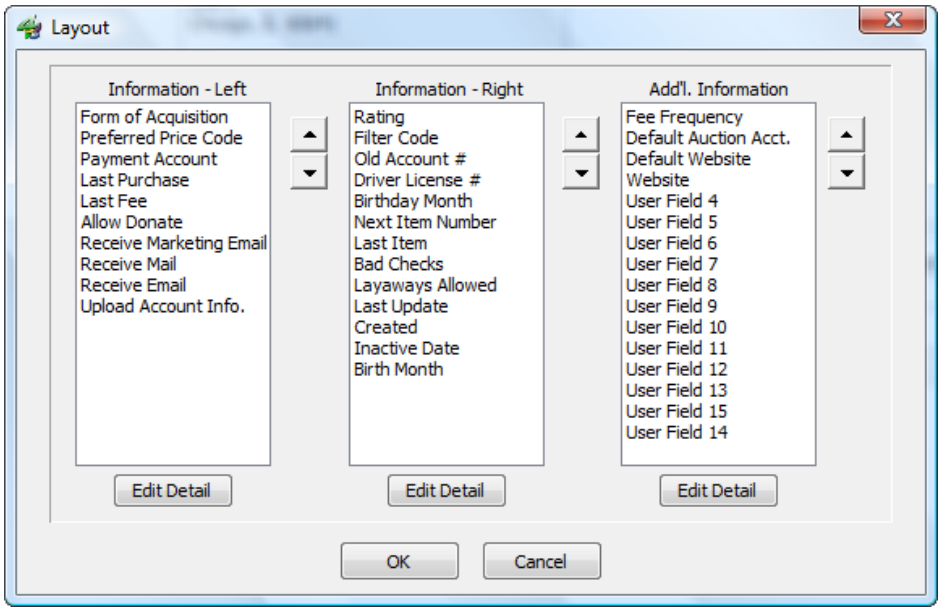
1. Move fields between of the Account and Additional Info screens.
2. Change the order of fields appearing on the Account and Additional Info windows.
3. Change the size of many of the fields on these two windows.

In addition to providing useful information on screen, reports can be generated based on information contained in these fields. Please note that changes made to this screen appear for all accounts.

To Move Fields From Screen To Screen:

1. Lookup any account.
2. Select **Task** → **Maintenance** → **Account Field Layout**, or

   Right-click anywhere below the Tabs (in other words, the lower half of the screen) and click on **Account Field Layout**. The **Layout** dialog will display:

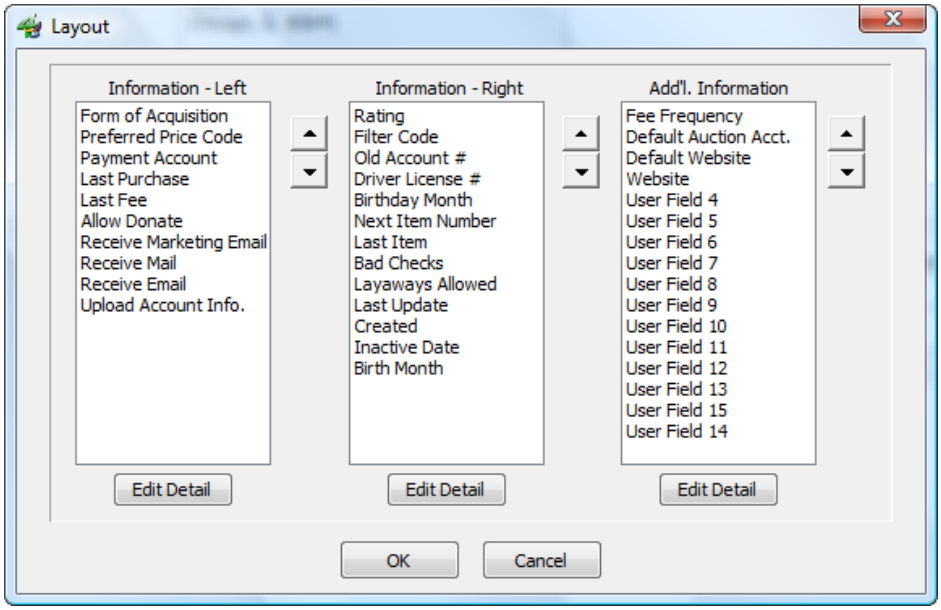


3. Click and drag the fields from column to column.

To Change the Order in which Fields Appear on Screen:

1. Lookup any account.
2. Select **Task** → **Maintenance** → **Account Field Layout**, or

Right-click anywhere below the Tabs (in other words, the lower half of the screen) and click on **Account Field Layout**. The **Layout** dialog will display:

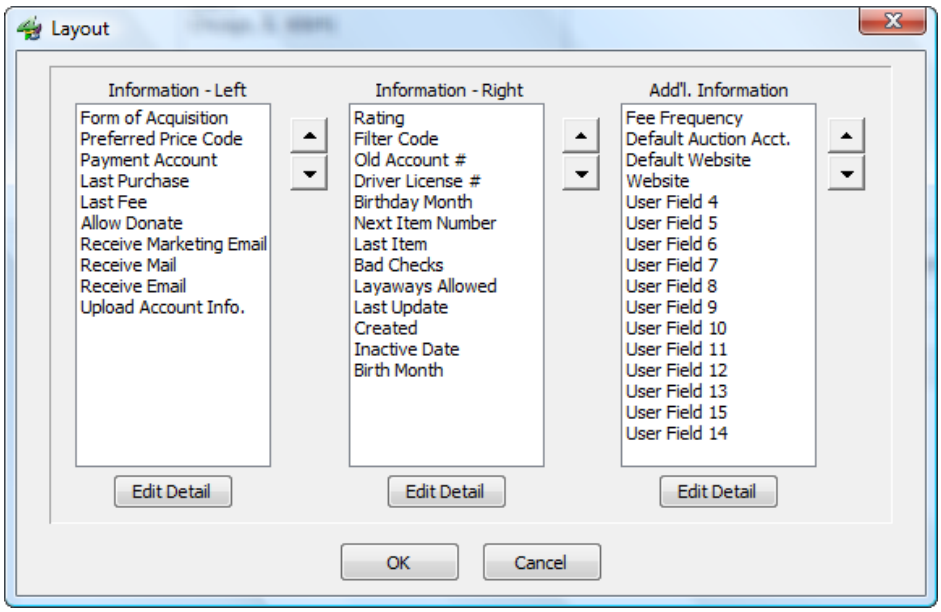


3. Highlight the field to be moved, then use the up or down arrow located to the right of column in which the field is listed to move the field up or down in the list.

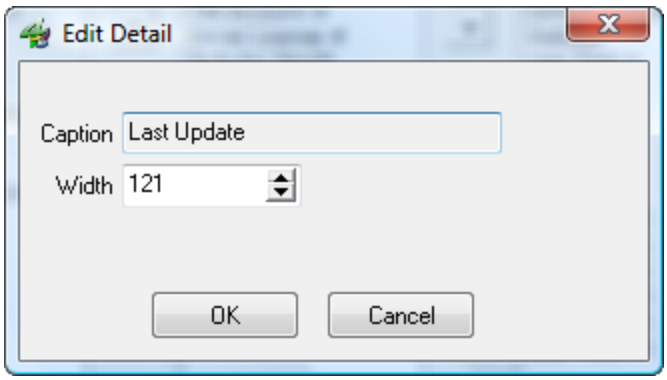
To Change the Size of a Field:

1. Lookup any account.
2. Select **Task** → **Maintenance** → **Account Field Layout**, or

   Right-click anywhere below the Tabs (in other words, the lower half of the screen) and click on **Account Field Layout**. The **Layout** dialog will display:



3. Highlight the field to be moved, then select the Edit Detail button for that field's column. The **Edit Detail** dialog will display.



4. Change the size of the field by changing the value of the **Width** field.
5. Click **OK** when finished, then click **OK** again.

Related Topic

Set Up Account Field Layout

Liberty Reports Overview

SET UP FEE FREQUENCIES

Inventory Module → Tools → Maintain → Fee Frequencies

Accounts may be assessed a fee on a regular basis for a variety of reasons. Examples of such fees include:

- Annual Consignment Fee
- Monthly Rental Fee

Setting up **Fee Frequencies** makes assessing fees to a large number of accounts quick and convenient.

To Assess Fees To Multiple Accounts Simultaneously Requires Three Steps:

1. Set up Fee Frequencies.
2. Enter the Fee Frequency in account's Fee Frequency field, which is found on the **Additional Info** tab.
3. Run the **Assess Fees** routine as appropriate.

To Set Up Fee Frequencies:

1. From Liberty Inventory's main menu select **Tools → Maintain → Fee Frequencies**.
2. Click on the **Add** button.
3. Type the fee frequency number in the blank Fee Frequency field.
4. Click on the **Save** button.
5. Repeat steps 2 - 4 to add additional fee frequency options.
6. When finished select the **Close** button.
7. In each account to be assessed a regular fee, select the appropriate Fee Frequency in the **Fee Frequency** field located on the **Additional Info** tab. To do this:
8. Lookup the account.

Copyright 2010, Resaleworld.com, Inc.

9. Select the **6. Add'l Info** tab.
10. Select the appropriate Fee Frequency from the drop-down in the Fee Frequency field.
11. Click the **Save** button.
12. To learn how to simultaneously charge fees to multiple accounts, see the section entitled Assessing Fees to Accounts and Items.

Related Topics

Additional Info tab

Assessing Fees to Accounts and Items

SET UP SPELL CHECKING FOR ITEM DESCRIPTIONS

Inventory Module ➔ *Item Entry Window* ➔ *Description Field*

Spell checking is available in the **Description** field of the Item Entry window. To spell check a description press **F7**. Before you can begin using the spell checking feature, you will need to set up a dictionary for the spell checker.

To Set Up The Spell Check Dictionary:

1. Click in the Description field in the Item Entry window.
2. Press the **F7** key.
3. Click on the **Yes** button when asked **…Edit Configuration?** The Spell Check Configuration dialog will display.
4. Click on the **Add** button located to the right of the **Main Dictionaries** panel.
5. Navigate to the Rwd directory on your C: drive and select **American.dct** from the list of files.

Copyright 2010, Resaleworld.com, Inc.

6. With American.dct highlighted, click on the Open button.
7. Click on the **OK** button.

Related Topics

Item Entry Windows - Overview

SET UP STORE SECTIONS

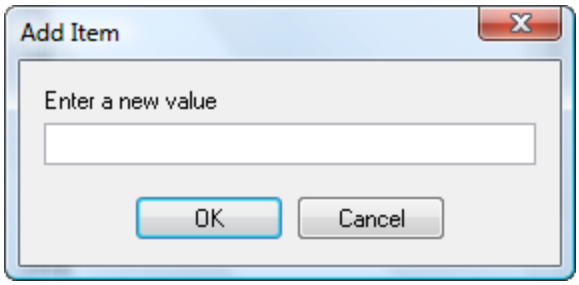
Inventory Module → Tools → Maintain → Sections

You can keep track of where store inventory is located in your store using the **Section** field as items are entered. Create your own store sections in whatever way makes sense to your store and inventory.

When adding inventory in the Item Entry window, you can then assign each item one of the store sections you defined.

To Add Store Sections:

1. From the main menu, select **Tools** → **Maintain** → **Sections**.
2. Click on the **Add** button. The **Add Item** dialogue displays.



3. Enter the name of the Section.
4. Repeat steps 2 and 3 until you have finished adding store sections, then click on the **Save**

5. Click on the **Close** button when finished.

To Delete Store Sections:

1. From the main menu, select **Tools** → **Maintain** → **Sections**.
2. Click on the store section you want to delete.
3. Click the **Delete** button, and then click **Yes**.
4. Click **Save** and then click the **Close** button.

> ***Note**: Once a store section has been used in an item, it cannot be deleted.*

Related Topic

The Item Entry Window

DEFINE CUSTOM FIELD NAMES

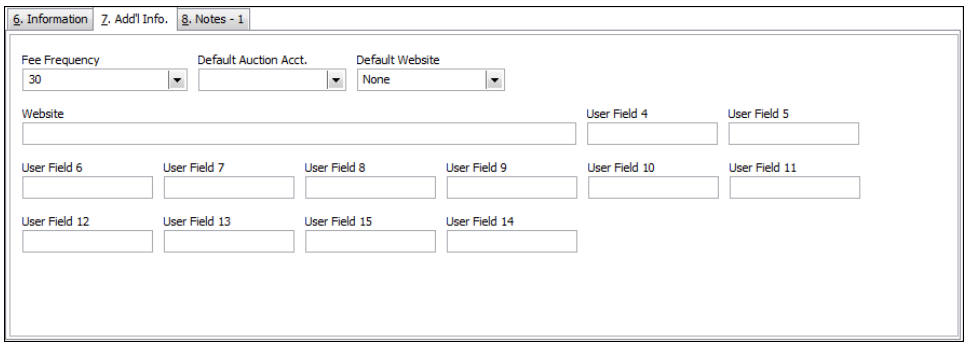
Inventory Module → Accounts → 7. Add'l Info Tab

There are 15 user-defined fields are available on the 7. Add'l Info tab. Use these fields to keep additional information about accounts. For example, you could create fields to store the account holder's birthday, spouse's name, etc.

In addition to providing useful information on screen, reports can be generated based on information contained in these fields. Please note that changes made to this screen display for all accounts.

To Change the Name of a Custom Field

1. Lookup any account.
2. Click on the **7. Add'l Info** tab. The Add'l Info. dialog will display:

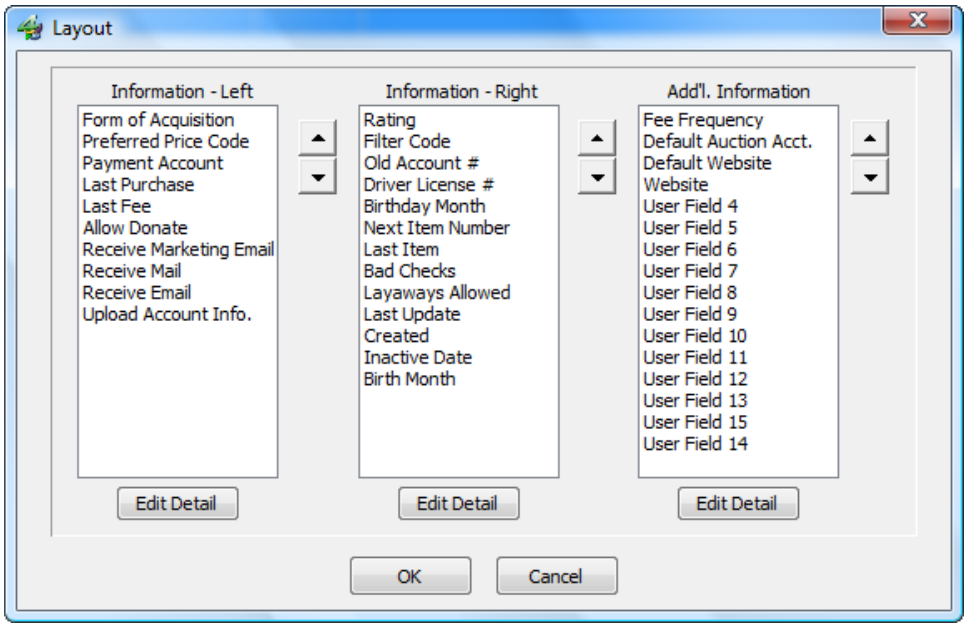


3. Select either:

   a. **Task** ➔ **Maintenance** ➔ **Account Field Layout**, or

   b. Right-click anywhere below the Tabs (in other words, the lower half of the screen) and click on **Account Field Layout**.

   The **Account Field Layout** dialog will display:



4. In the right-hand column, highlight the User Field (there are 15, numbered 1-15) to be renamed, then select the **Edit Detail** button.

5. Change the name of the field(s) in the **Edit Detail** dialog.

   Note: *Once the name of a field has been changed, Liberty allows you to see the original name of the field by hovering the mouse over the new name.*

6. If desired, change the size of the field in the **Width** field.

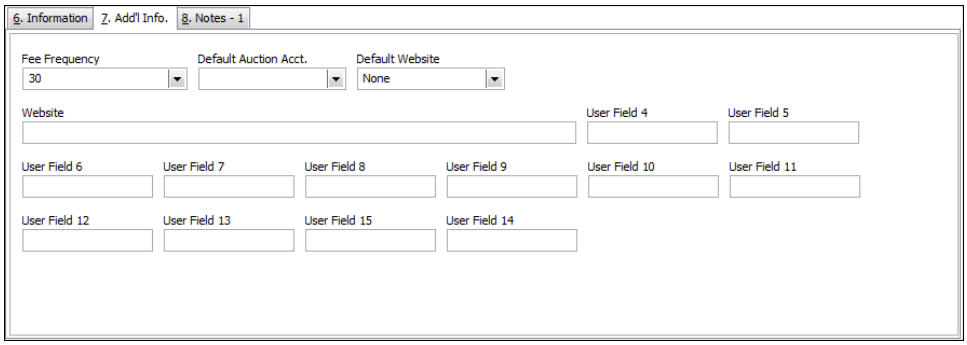
7. Select the **OK** button.

Copyright 2010, Resaleworld.com, Inc.

8. Select the **OK** button again.

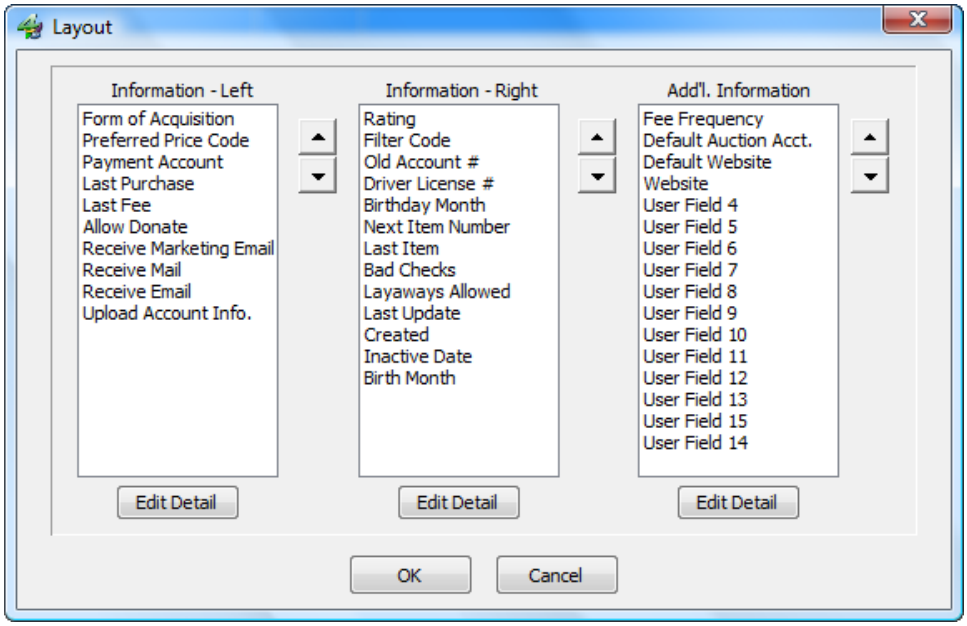
To Move Fields Between the Information and Add'l Info Screens

1. Lookup any account.
2. Click on the **7. Add'l Info** tab. The Add'l Info. dialog will display:



3. Select either:
   a. **Task** ➔ **Maintenance** ➔ **Account Field Layout**, or
   b. Right-click anywhere below the Tabs (in other words, the lower half of the screen) and click on **Account Field Layout**.

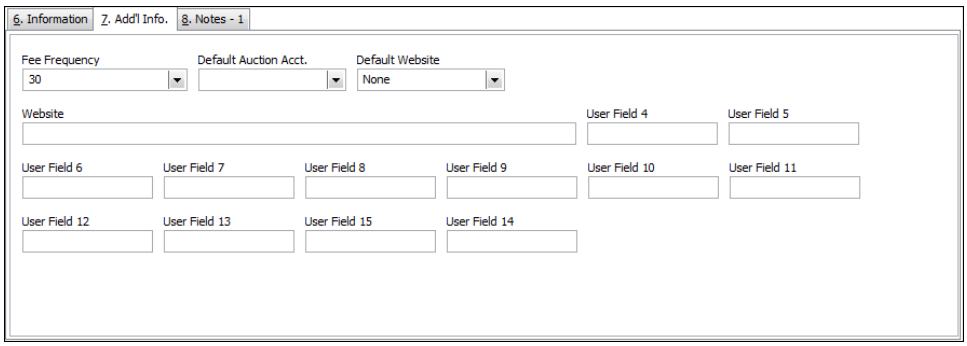
   The **Account Field Layout** dialog will display:



4. Click and drag the fields from column to column.
5. Select **OK** when finished.

To Change the Order in which Fields Appear on Screen

1. Lookup any account.
2. Click on the **7. Add'l Info** tab. The Custom dialog will display:

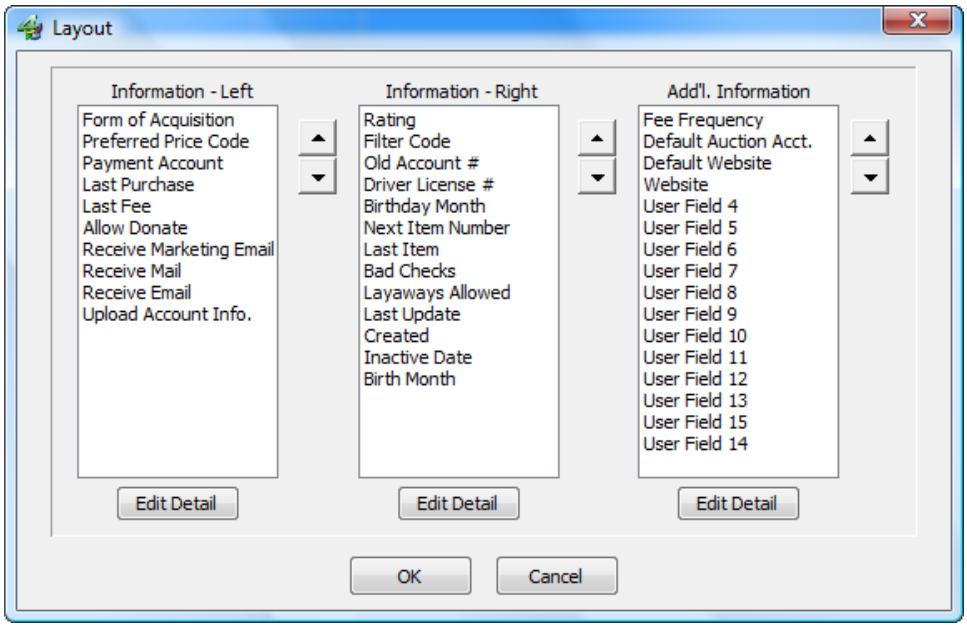


3. Select either:

   a. **Task** ➔ **Maintenance** ➔ **Account Field Layout**, or

   b. Right-click anywhere below the Tabs (in other words, the lower half of the screen) and click on **Account Field Layout**.

   The Account Field **Layout** dialog will display:



4. Highlight the field to be moved, then use the up or down arrow located to the right of column in which the field is listed to move the field up or down in the list.

Related Topic

Set Up Account Field Layout

Liberty Reports Overview

DEFINE FILTER CODES

Inventory Module → *Tools* → *Maintain* → *Filter Codes*

Use **Filter Codes** to segregate accounts when running reports. Some stores, for example, use the Filter Code to distinguish their better clients as *VIP* accounts. Filter Codes are assigned to accounts using the Filter Code field, which is located on the **Additional Info** tab of the Account Detail window.

Filter Codes must be added from the **Filter Code Maintenance** window before they can be used in an account.

Add a Filter Code

1. Select **Tools** from the Main menu, then **Maintain**, then **Filter Codes**.
2. Click **Add.**
3. Enter the name of the **Filter Code**.
4. Click **Save**.

Related Topic

Additional Info Tab

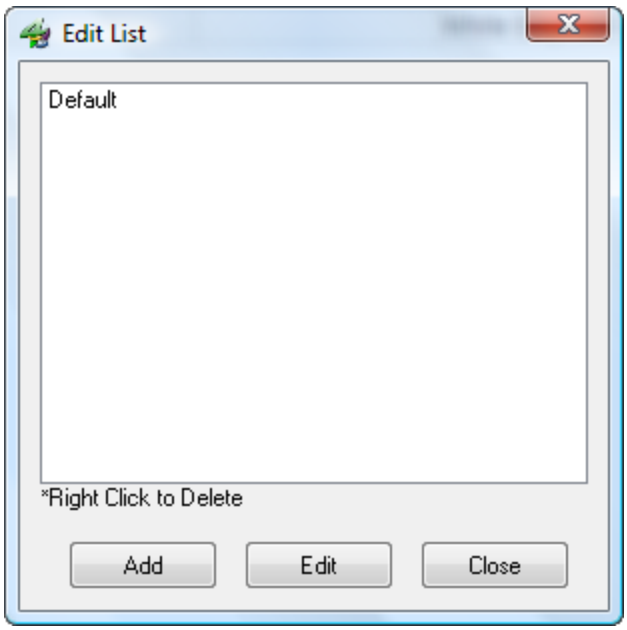
SET UP LOCATIONS

Inventory Module → Tools → Maintain → Locations

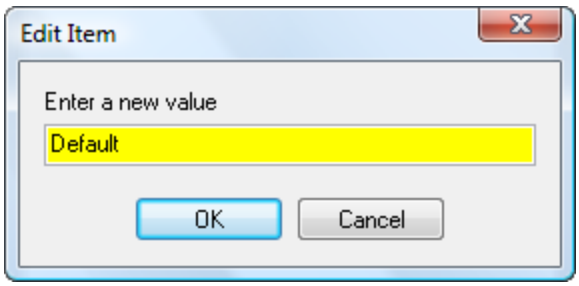
Some businesses have multiple locations and require the ability to track items by their location. These locations may be separate retail storefronts and/or warehouse sites. In order to make use of the Location field when maintaining inventory it is necessary to enter the Locations into Liberty. This is accomplished using the Maintain Locations routine.

To Rename the Default Location:

1. In the Inventory Module select **Tools** → **Maintain** → **Locations**. The **Edit List** dialog will display:



2. Note that one location is already entered with the name Default. Highlight the word **Default** and click the **Edit** button. The Edit Location dialog will display:

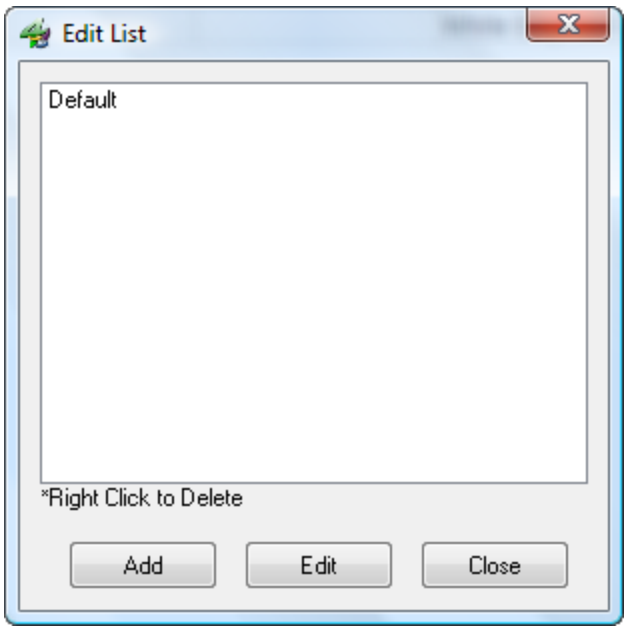


3. Enter the name of the **Location** that will most frequently be entered in place of the word Default. For instance, if there are two locations, one in New York and one in Los Angeles, and New York is where the majority of items will be, then enter New York in place of Default.

4. Click **OK** when finished.

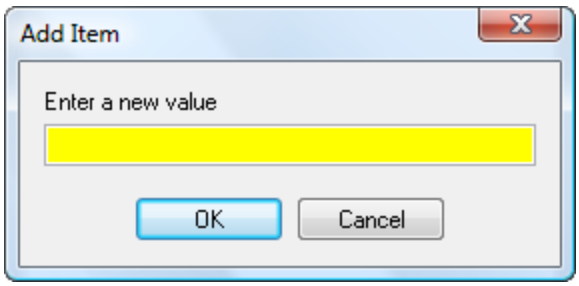
To Add or Edit a Location:

1. In the Inventory Module select **Tools** → **Maintain** → **Locations**. The **Maintain Locations** dialog will display:



2. Click the **Add** button. The Add Location dialog will display.

Copyright 2010, Resaleworld.com, Inc.

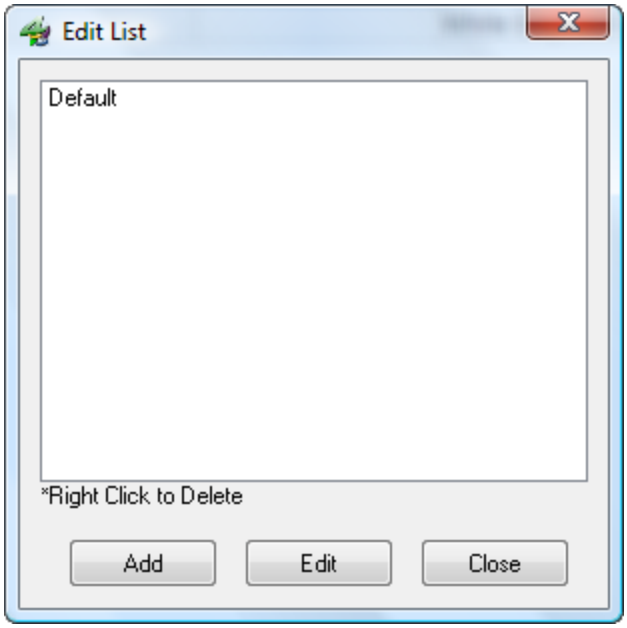


3. Enter the **Location**, and then click the **OK** button.

To Delete a Location:

Note: *A location may be deleted only if it has not been used.*

1. In the Inventory Module select **Tools** → **Maintain** → **Locations**. The **Maintain Locations** dialog will display:



2. Right-click on the **Location** to be deleted.
3. Select "Delete Item".
4. Select **Yes** on the confirmation dialog.

Related Topics

One of a Kind Item Entry Window

SET UP EXPIRE ACCOUNT NAMES

Inventory Module → *Tools* → *Maintain* → *Expire Group*

Use this procedure to set up names for **Expire Groups**. Use Expire Groups to organize expired items by expired groups. For Liberty for Windows users this feature is similar to placing an item in an expired account.

> ***Note**: It is not necessary to set up Expire Groups to Expire items. Expire groups are only needed if you wish to categorize expired items in some way so as to be able to generate reports based on expire groups.*

To Set Up Expire Groups:

1. From Liberty Inventory's main menu click on **Tools** → **Maintain** → **Expire Group**.
2. Click on the **Add** button, and type the new expired group name.
3. Click on the **Save** button and then the **Close** button when you are done adding commission types.

Once you have created the Expire Groups, you may assign them to various Price Codes. Please see the section entitled Price Codes for more information.

Related Topics

Define Price Codes

Expire Post

SET UP CAMERA DEFAULTS

Inventory Module → *Tools* → *Options* → *Camera Tab*

Camera Defaults instruct Liberty where to look for photos when adding photos to Auction Items. You may also set an option to delete photos from the disk after they have been attached to an item.

To Set Up Camera Defaults:

1. From Liberty Inventory's main menu click on **Tools** ➔ **Options**, and then click on the **Camera** tab.
2. Note that the default path (location) where Liberty looks for photos is the **A** drive, which is the 1.44Mb Floppy drive on most computers. If this is OK, skip to Step 3.

   To change the location, enter the path in the **Camera Directory** field, or click on the button to the right of the Camera Directory field, browse for the location so that the correct location appears in the **Directory Name** field, then click **OK**.
3. Click to put a check in the **Automatically Delete Photos After Adding to Liberty** checkbox if you want to use this option.
4. Click **Save** when finished.

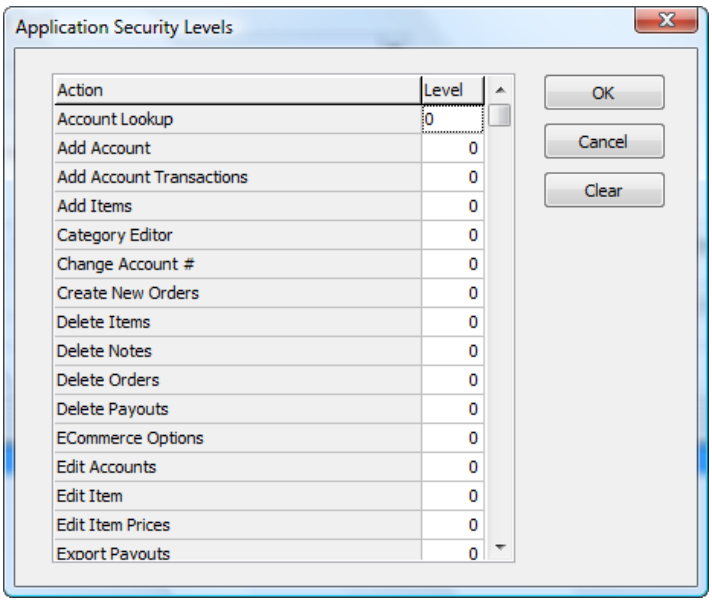
Set Up Security Levels for Employee Access to Liberty

Inventory Module ➔ Tools ➔ Security ➔ Application Security Levels & Report Security Levels

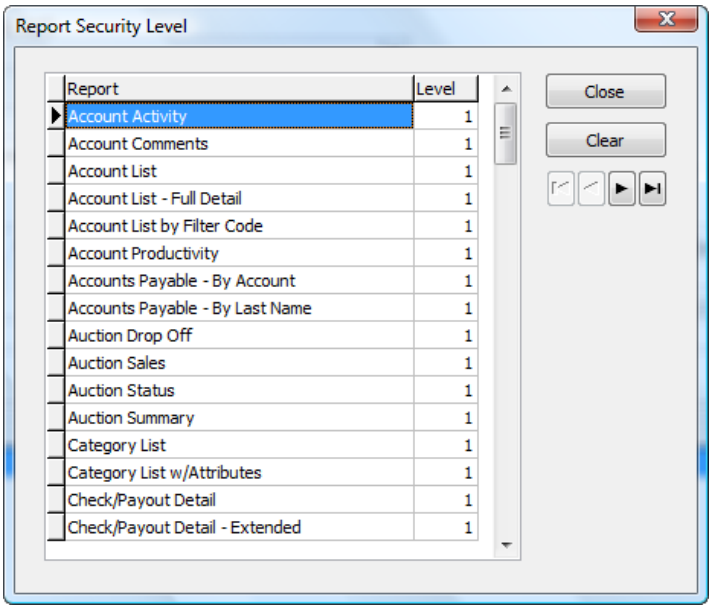
The database within Liberty contains a great deal of information, some of it confidential and sensitive. Restricting access to this information is often necessary for both legal and business reasons.

From the **Application Security Levels** and **Report Security Levels** dialogs you can set access levels for employees. This lets you limit employee access to specific areas of Liberty.

Application Security Levels Dialog



Report Security Levels Dialog



By setting security levels to the different areas of Liberty, you can then set up users in the **User Maintenance** (**Tools** ➔ **Security** ➔ **User Maintenance**) dialog and assign each user an appropriate security level. Security levels and user accounts let you give some employees full access, while giving others restricted access. For example, you could restrict certain users to only have the ability to add new accounts and new items to Liberty.

You can set the security level to any number from 1 to 10 on each component in the **Application Security Levels** dialog. When you have finished setting the security levels, set up user accounts.

The Way Security Levels Work:

Higher Security Level numbers allow access to Lower Security Level numbers.

Copyright 2010, Resaleworld.com, Inc.

In other words, if your Security Level number is greater than or equal to the Security Level assigned to the Protected Item, then you will have access to that Protected Item. If, however, your Security Level number is less than the Security Level assigned to the Protected Item, then you will NOT have access to that Protected Item.

Mathematically this is represented by the following formulae:

- Users Security Level = Level assigned to Protected Item then Access is Granted
- Users Security Level < Level assigned to Protected Item then Access is Denied

When setting up Security Maintenance we suggest you not get overly elaborate. In most cases three security levels is sufficient.

IMPORTANT NOTES:

1. **Remember to put the highest level of security on the Passwords area so that nobody else can alter the Passwords you have established!**
2. **Give yourself the highest level of Security.**
3. **For simplicity, the Security Level should not go any higher then 10.**

To set security levels in the Security Maintenance dialog, click in the Level field(s) and enter a number between 0 and 999. When finished entering Security Levels, click the Close button.

Example 1: If you set the Accounting components to 10, only users with a security level of 10 will have access to these components. If you set the Tools components to 5, only users with a security level of 5 or greater will have access to these components.

Example 2: Users assigned a Security Level of 3 are allowed access to Protected Items with a level of 0, 1, 2, or 3, but not to Protected Items with a Level of 4 or higher.

Related Topics

Set Up Employee Access to Liberty

How to Bypass the Security Login So It Doesn't Appear Each Time Liberty Starts

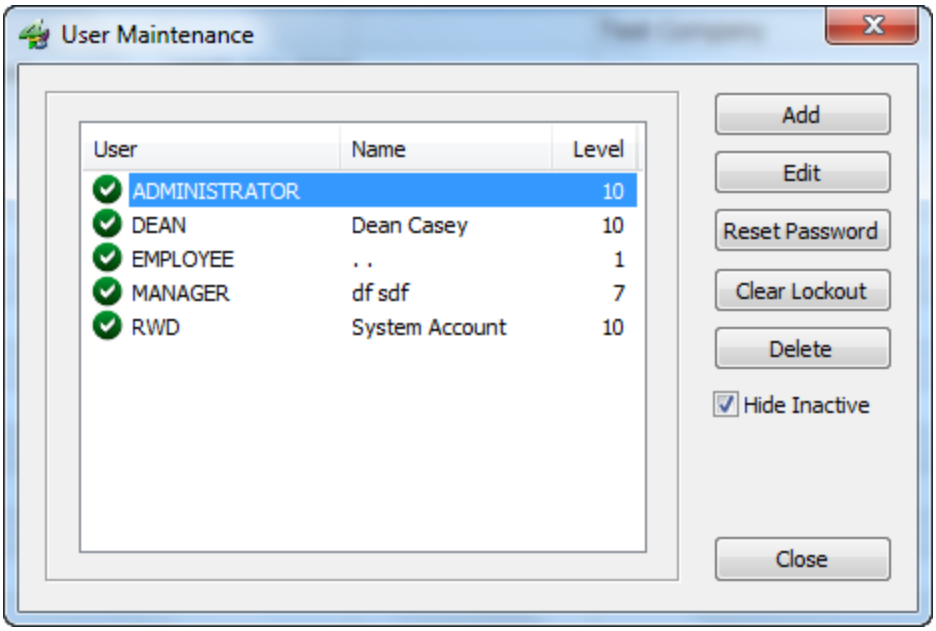
SET UP EMPLOYEE ACCESS TO LIBERTY

Inventory Module → *Tools* → *Security* → *User Maintenance*

From the **User Maintenance** window, you can set up one or more user accounts. User accounts:

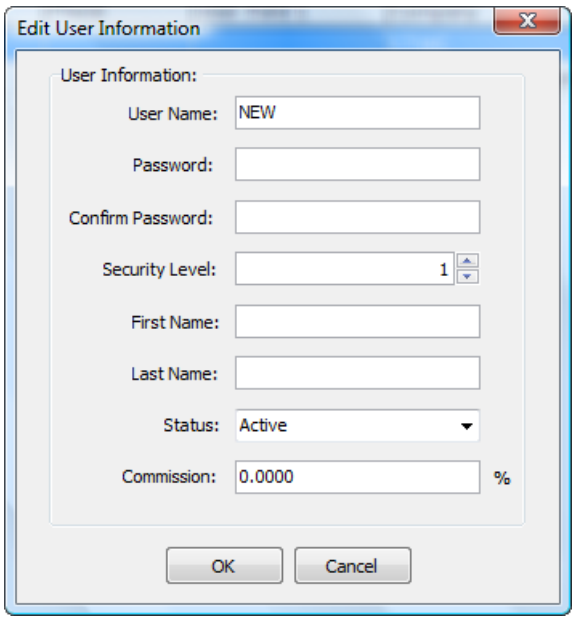
1. Provide login capabilities to Liberty.
2. Determine which parts of Liberty a user can access.
3. Are used to identify Sales Clerks in Point of Sale for tracking sales by employee.

Liberty comes with one user account already created. The user name is **RWD**, and the password is also **RWD**.



Add New User:

1. From the Main Menu, select **Tools** → **Security** → **User Maintenance**. The User Maintenance dialog (above) will display.
2. Click on the **Add** button. The **Edit User Information** dialog will display:



3. Add the appropriate user information (see the table below). Click the **OK** button when finished.

User Information Field Definitions

User Name — Enter a name the user will enter when logging in to the system.

Password — Enter a password the user will enter when logging in to the system. Asterisks will appear in place of the characters you type to keep the password secure.

> ***Note:*** *The Password field is used to set the initial password for a user. When editing an existing User, the password fields will be inactive.*

Confirm Password — Enter the same user password you entered in the Password text box to verify that you've entered the correct password.

Security Level — Set the security level for this user if you want to limit the user's access to various parts of Liberty.

> ***Note:*** *Higher Security Level numbers allow access to Lower Security Level numbers.*

First Name & Last Name — Enter employee's first and last name, up to 30 characters each.

Status — Select **Active** if you want to be able to use the account now. Select **Inactive** if you want to save the account in Liberty but do

Copyright 2010, Resaleworld.com, Inc.

	not want to use it now. You may choose to make an account inactive when an employee is on vacation, for example.
Commission	This is a reference field only, and is not used at this time.

Edit Existing User:

1. Click on the user to which you wish to effect changes, then click on the **Edit** button.
2. Make changes as necessary. See the table above for general guidelines to the fields on the Edit User Information dialog.

> ***Note:*** *The Password field is used to set the initial password for a user. When editing an existing User, the password fields will be inactive. Use the* ***Reset Password*** *button to change an existing password.*

3. Click **OK** when finished.

Delete a User:

> ***Note:*** *A user account can not be deleted once it has been used – it can only be made inactive.*

1. From Liberty Inventory's Main menu click on **Tools** → **Security** → **User Maintenance**.
2. Click on the user to be deleted in the **User** list, and click on the **Delete** button.
3. The user is deleted immediately and no longer displays on the User Maintenance dialog.

To Make a User Inactive:

1. From Liberty Inventory's Main menu click on **Tools** → **Security** → **User Maintenance**.
2. Click on the user to be made Inactive in the **User** list, then click on the **Edit** button.
3. In the **Status** field drop-down, select **Inactive**.
4. Click **OK**.

Related Topics

Set Up Security Levels for Employee Access to Liberty

User Maintenance Dialog

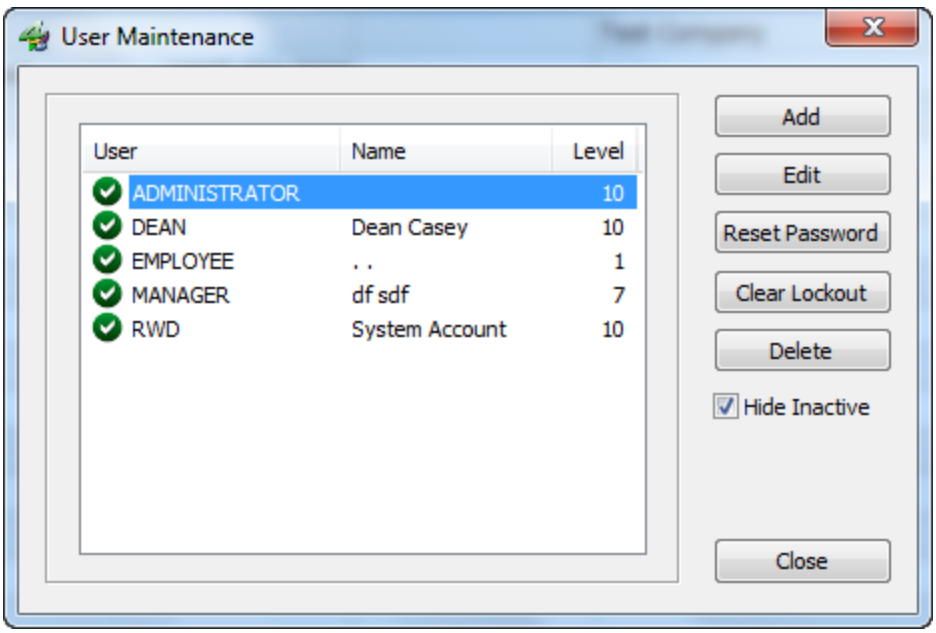
Copyright 2010, Resaleworld.com, Inc.

USER MAINTENANCE

Inventory Module → *Tools* → *Security* → *User Maintenance*

From the **User Maintenance** window, you can create or manage individual user accounts. From the User Maintenance dialog, you can perform the following functions:

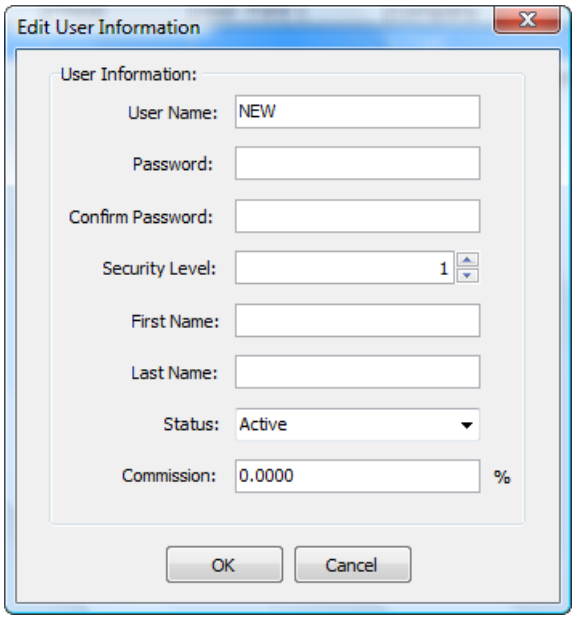
- Add a new user account
- Edit an existing user
- Make a user inactive
- Reset password for an account
- Clear a locked out user
- Delete an existing user



Copyright 2010, Resaleworld.com, Inc.

Add New User:

1. From the Main Menu, select **Tools** ➔ **Security** ➔ **User Maintenance**. The User Maintenance dialog (above) will display.
2. Click on the **Add** button. The **Edit User Information** dialog will display:



3. Add the appropriate user information (see the table below). Click the **OK** button when finished.

USER INFORMATION FIELD DEFINITIONS

User Name	Enter a name the user will enter when logging in to the system.
Password	Enter a password the user will enter when logging in to the system. Asterisks will appear in place of the characters you type to keep the password secure.

> ***Note:*** *The Password field is used to set the initial password for a user. When editing an existing User, the password fields will be inactive. Use the* ***Reset Password*** *button to change an existing password.*

Confirm Password	Enter the same user password you entered in the Password text box to verify that you've entered the correct password.
Security Level	Set the security level for this user if you want to limit the user's access to various parts of Liberty.

Copyright 2010, Resaleworld.com, Inc.

> ***Note:*** *Higher Security Level numbers allow access to Lower Security Level numbers. Please see the section entitled Set Up Security Levels for Employee Access to Liberty for more details.*

First Name & Last Name	Enter employee's first and last name, up to 30 characters each.
Status	Select **Active** if you want to be able to use the account now. Select **Inactive** if you want to save the account in Liberty but do not want to use it now. You may choose to make an account inactive when an employee is on vacation, for example.
Commission	This is a reference field only, and is not used at this time.

Edit Existing User:

1. Click on the user to which you wish to effect changes, then click on the **Edit** button.
2. Make changes as necessary. See the table above for general guidelines to the fields on the Edit User Information dialog.

> ***Note:*** *The Password field is used to set the initial password for a user. When editing an existing User, the password fields will be inactive. Use the* ***Reset Password*** *button to change an existing password.*

3. Click **OK** when finished.

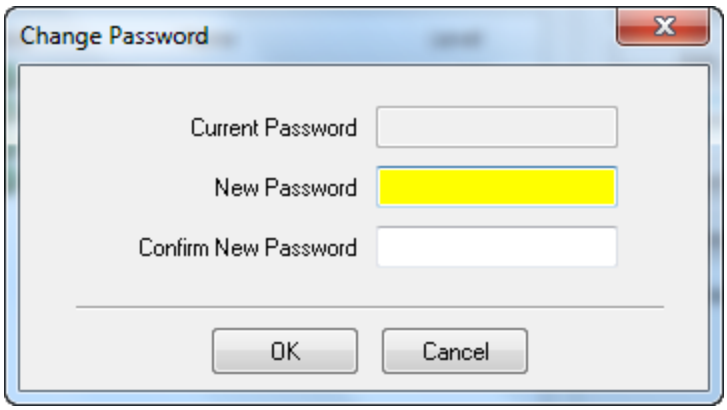
To Make a User Inactive:

1. From Liberty Inventory's Main menu click on **Tools** → **Security** → **User Maintenance**.
2. Click on the user to be made Inactive in the **User** list, then click on the **Edit** button.
3. In the **Status** field drop-down, select **Inactive**.
4. Click **OK**.

Reset Password

1. Select the user whose password you are resetting.
2. Click the **Reset Password** button. The Change Password dialog displays.

Copyright 2010, Resaleworld.com, Inc.



3. Enter the New Password that will be used for this user.
4. Confirm the new password in the field below.
5. Click **OK** to reset this password or click **Cancel** to exit without changing the existing password.

Clear a Locked Out User:

1. From Liberty Inventory's Main menu click on **Tools** → **Security** → **User Maintenance**.
2. Select the user who is locked out from the **User** list, and click on the **Clear Lockout** button.
3. The user's account is unlocked and can now be used again to log in to Liberty..

Delete A User:

> ***Note:*** *A user account can not be deleted once it has been used – it can only be made inactive.*

1. From Liberty Inventory's Main menu click on **Tools** → **Security** → **User Maintenance**.
2. Click on the user to be deleted in the **User** list, and click on the **Delete** button.
3. The user is deleted immediately and no longer displays on the User Maintenance dialog.

Related Topics

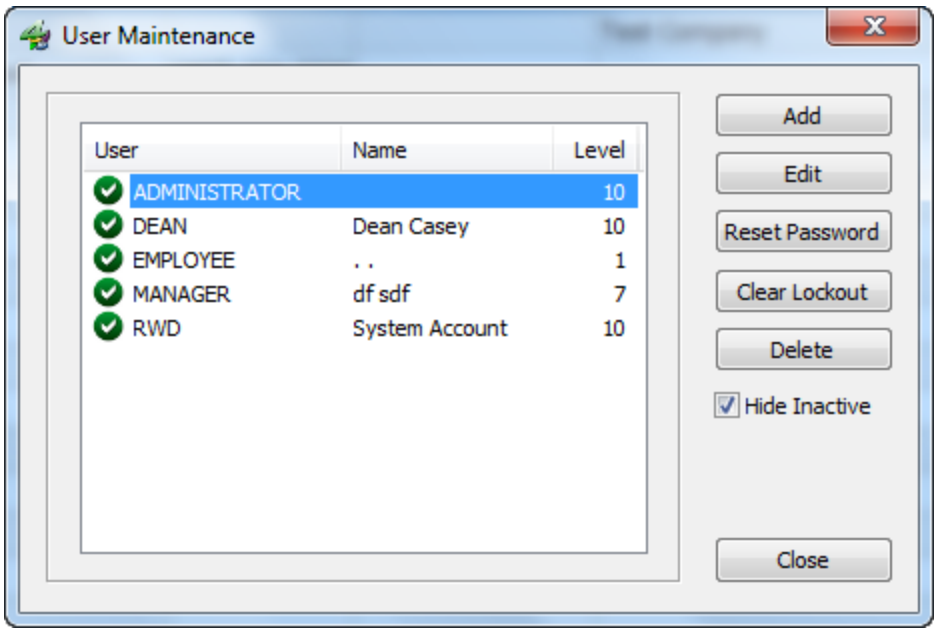
Set Up Security Levels for Employee Access to Liberty

CHANGE THE PASSWORD FOR A USER

Inventory Module → *Tools* → *Security* → *User Maintenance*

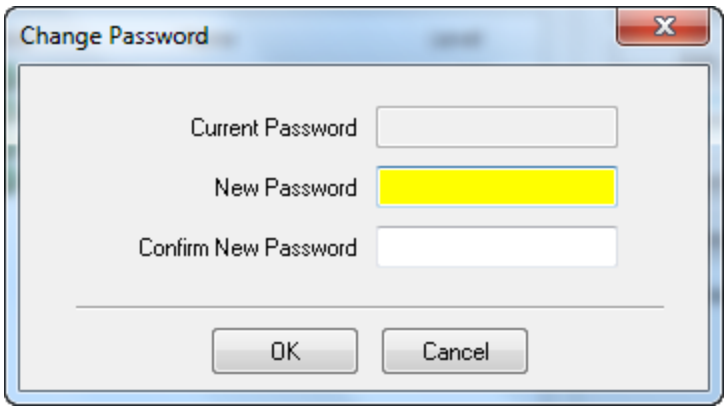
Reset Password

1. From the Main Menu, select **Tools** → **Security** → **User Maintenance**. The User Maintenance dialog will display.



2. Select the user whose password you are resetting.
3. Click the **Reset Password** button. The Change Password dialog displays.

Copyright 2010, Resaleworld.com, Inc.



4. Enter the New Password that will be used for this user.
5. Confirm the new password in the field below.
6. Click **OK** to reset this password or click **Cancel** to exit without changing the existing password.

Related Topics

Set Up Employee Access to Liberty

How to Bypass the Security Login

BYPASSING SECURITY LOGIN

It is possible to bypass the normal security login. Doing so eliminates the need to enter the User Name and Password each time a Liberty program is started.

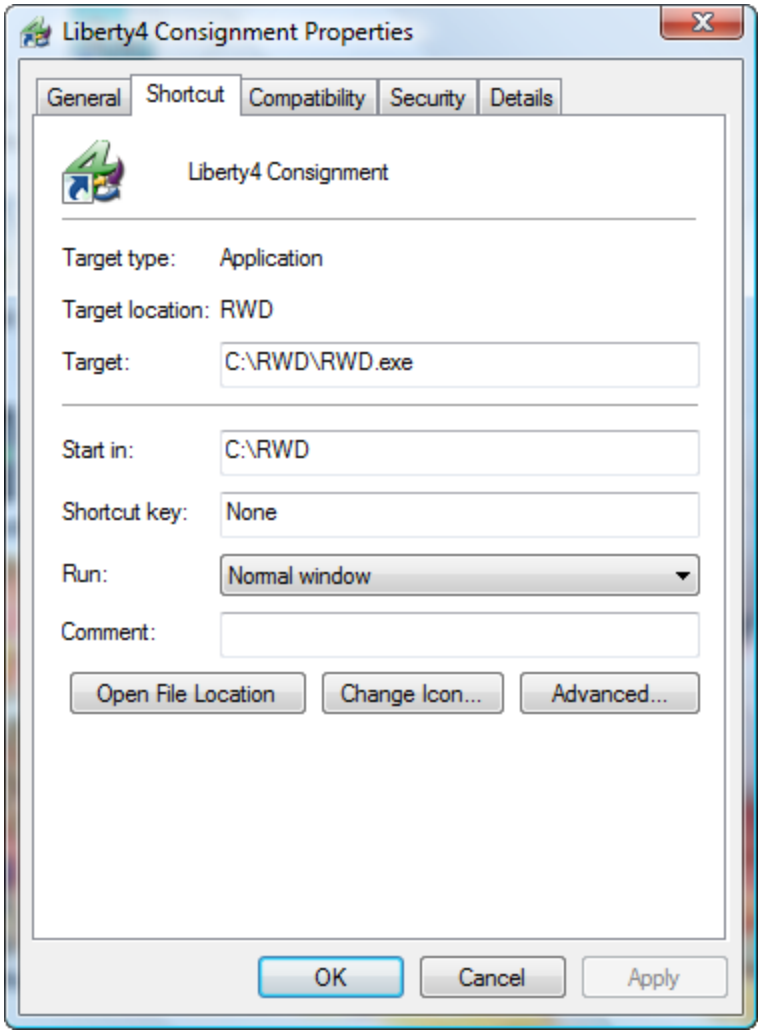
To bypass the security login, it is necessary to change the Properties of the Shortcut that starts the program.

> ***Note:*** *you must change the Properties for each shortcut – in other words, the following procedure must be performed on the Liberty Point of Sale shortcut, the Liberty Inventory shortcut, etc.*

Copyright 2010, Resaleworld.com, Inc.

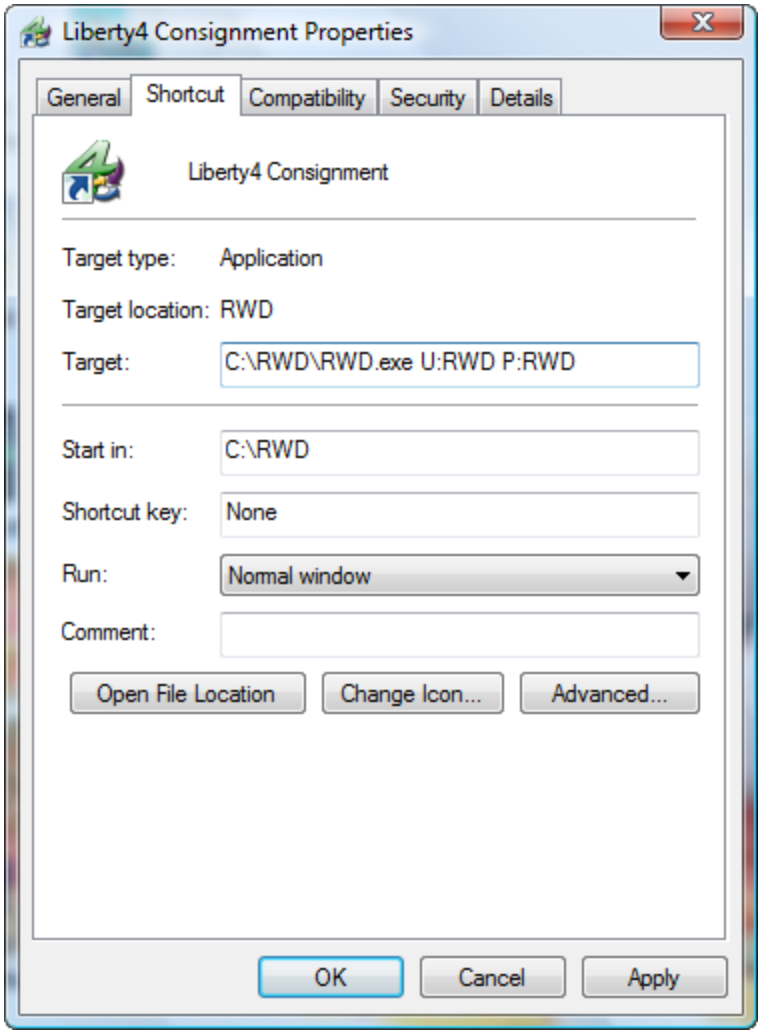
To Bypass the Security Login

1. Right-click on the shortcut, then select **Properties**. The **Consignment Properties** dialog will display:



2. In the Target field, add **U:{user name} P:{password}** after the path that is already listed in the target.

For example, if the user name is **RWD** and the password is **RWD**, the entire line would read **C:\rwd\rwd.exe U:RWD P:RWD**. See the following dialog as an example.



Related Topics

Set Up Employee Access to Liberty

SET UP PRODUCT LOOK UPS (PLUS)

PoS Module → *Setup* → *Maintain PLUs*

When using Point of Sale, **Product Lookup Codes** (PLUs) are used as a shortcut to quickly enter sales. PLUs eliminate the need to print a price tag for an item. They also eliminate the need to scan a bar code or enter the item number. Instead just a one or two digit PLU number is entered.

PLUs are especially useful when selling

- Small miscellaneous items. For instance, those displayed on or near the sales counter, such as trinkets, bubble gum, candy, mints, etc.;
- Items with no price tag printed.

To Add Product Lookups:

1. From the main menu of Liberty Point of Sale click on **Setup** ➔ **Maintain PLUs**.
2. Click on the **Add** button. The **Add Product Lookup** dialog will display.
3. Select a number for the PLU from the **PLU** drop-down list.
4. Enter the Account # - Item # in the **Item #** field.

   Example: For item 459 in account 29432, enter 29432-459. (Leading zeros are not necessary.)
5. Confirm the name that appears in the **Item Name** field is correct
6. Click **OK**.

SET UP ITEM DESCRIPTIONS

PoS Module ➔ *File* ➔ *Add New Item*

Use this procedure to set up item descriptions that your store uses often. Setting up descriptions speeds up item entry in two areas of Liberty:

1. Entering inventory in the Item Entry windows in Liberty Inventory, and
2. The **Quick Item Entry** process when adding items from Liberty Point of Sale.

Copyright 2010, Resaleworld.com, Inc.

To Set Up Item Descriptions:

1. From the main menu of Liberty Point of Sale click on **File** → **Add New Item**, or type **<Ctrl> <Insert>**.
2. Place the cursor in the **Description** field.
3. Press the **F2** key.
4. Enter a label for the description in the **Description Label** field. This should be a short, memorable abbreviation for the full text that will appear in the Description.

   Example: Use a Description Label of **SS** for Short Sleeve, or **VT** for Victorian Table.
5. Enter the full description that will appear in the Description field of the item record in the **Description Text** box.
6. Click on the **OK** button.

Related Topic

Quick Item Entry in PoS

INTRODUCTION TO ECOMMERCE SET UP

Liberty4 Consignment is primarily designed to handle items sold from a physical store. Liberty4 Trading Assistants is designed primarily to handle selling items online.

While most of the functions located under **Tools** → **Ecommerce Options** exist specifically for selling online, some functions found under Ecommerce Set Up in Liberty4 Trading Assistants are also used by Liberty4 Consignment. An example is the ability to automatically email inventory, transaction, and payout information to clients.

Although many of the Ecommerce functions are not used in Liberty4 Consignment, details on their use are included here to provide background on Liberty 4 Trading Assistants should you choose to learn more.

Copyright 2010, Resaleworld.com, Inc.

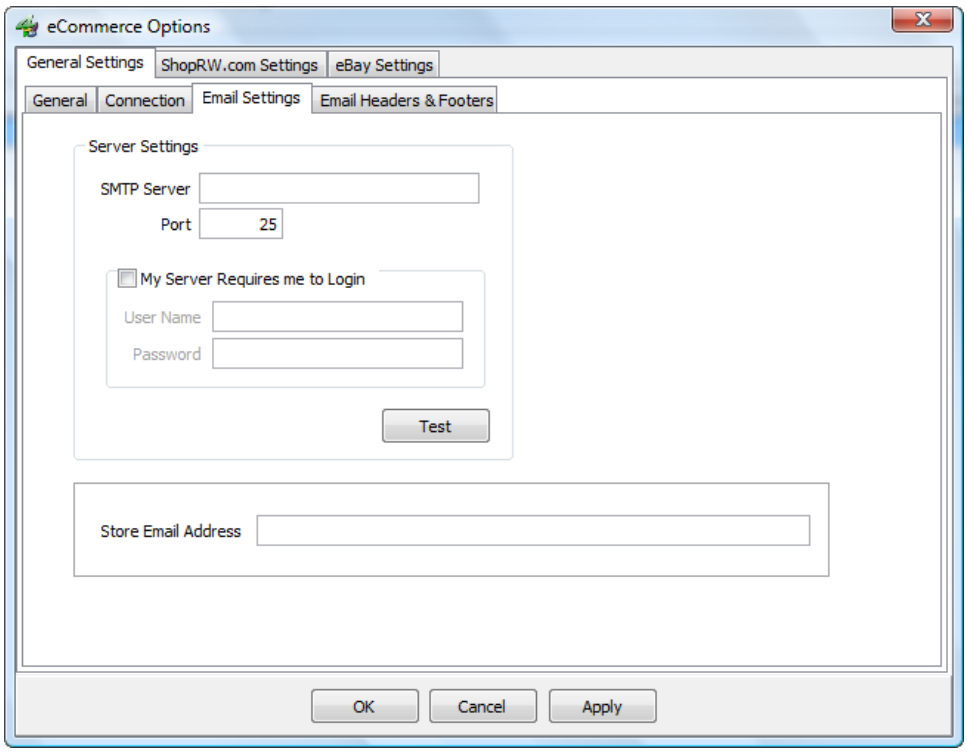
ECOMMERCE EMAIL SET UP

Inventory Module → Tools → Ecommerce Options → Email Settings Tab

In order to send emails to customers (i.e., shipping, order completion, etc.), you must specify the outgoing mail server settings that Liberty will use to send those emails. The **Email Tab** of the Ecommerce Options dialog specifies outgoing email server settings for Liberty to communicate with your customers.

To Set Up Email Settings

1. Select **Tools** → **Ecommerce Options** and click on the **Email Settings** tab. The **Email Settings** dialog will display:



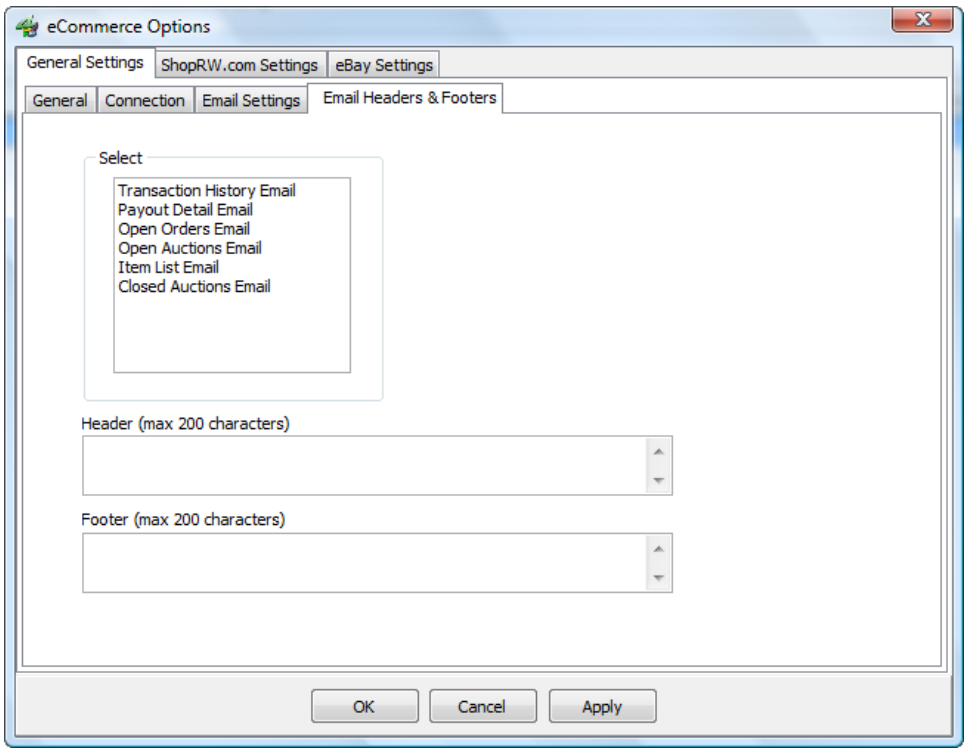
2. In the **SMTP Server** field, enter the full-qualified name of your SMTP server (e.g. *smtp.r-esaleword.com*) or its IP Address. For assistance with this field, contact your Internet Service Provider or network administrator.

3. In the **Port** field specify the port number through which Liberty will send emails to the

SMTP Server.

> ***Note:*** *It is recommended that you do not change the port number from the default 25 unless instructed to so by your Internet Service Provider or network administrator.*

4. Check the **My Server Requires me to Login** checkbox if SMTP server requires using username and password. If it does:
    a. Enter the user name used to login to your SMTP server in the **User Name** field, and
    b. Enter the password in the **Password** field.
5. Various email message headers and footers may be set up by highlighting the type of email message on the **Email Headers & Footers** panel and then selecting tab.



> ***Reminder:*** *For information about the SMTP server settings (including port, user-name, and password), contact your ISP or network administrator: do not contact Resaleworld for this information (as we do not possess it).*

Related Topics

Sending Automated Emails with the Event Manager

Using Reports to Send Client Emails

Copyright 2010, Resaleworld.com, Inc.

ECOMMERCE INTERNET CONNECTION SET UP

Inventory Module → Tools → Ecommerce Options → Connection Tab

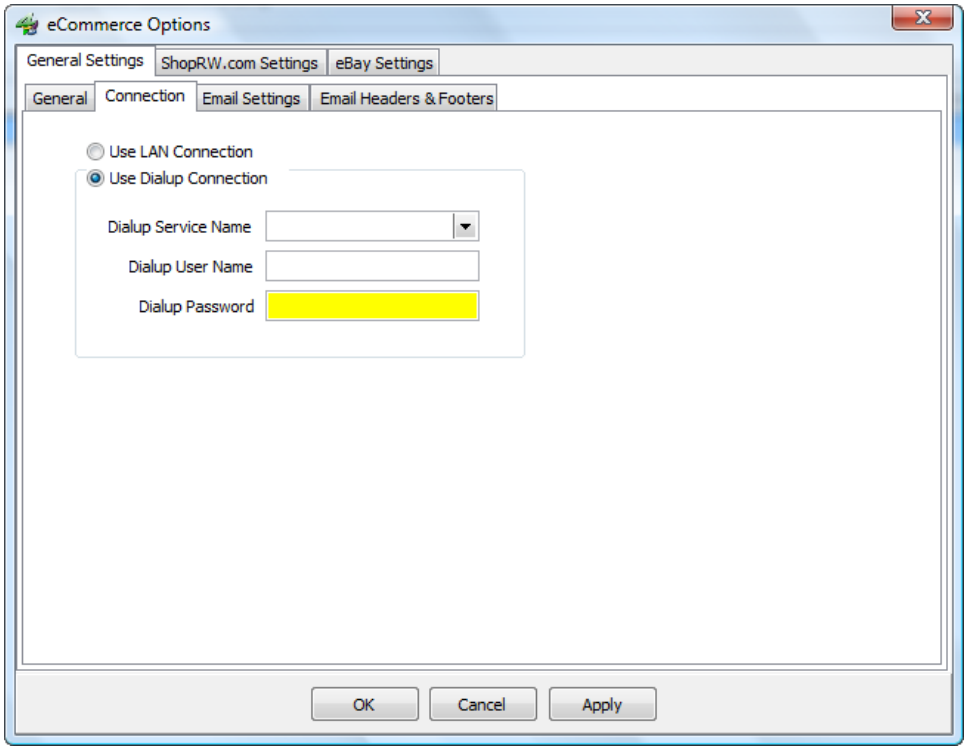
Use the **Connection Tab** of the Ecommerce Options dialog to set up your enable Internet connectivity from within Liberty. This allows Liberty to communicate with auction sites and brokers as you manage your online auctions.

You must have your Internet connection set up and working properly before performing this set up routine. The type of connection you use will depend upon your computer configuration. For more information about setting up your computer's Internet connection(s) using a Local Area Network (LAN), network card, modems, etc., please consult the documentation provided with your Windows Operating system or Internet connection hardware, and/or contact your Internet Service Provider (ISP).

To Set Up Liberty's Internet Connection

1. From the Main Menu, select **Tools** → **Ecommerce Options**, then click on the **Connection** tab.

Copyright 2010, Resaleworld.com, Inc.



2. *If you are using a cable or DSL modem*, all that is necessary is to select the **Use LAN Connection** radio button and click the **OK** button.

   If you are using a dialup connection over your phone line, select the **Use Dial-up Connection** radio button, then enter the appropriate information in the following three fields:

   a. **Dialup Service Name.** Select the dialup service from the drop-down menu. Liberty will populate this drop-down with the services currently installed on your computer.

   b. **Dialup User Name**. Enter the user name needed to enable the dial-up account. If you do not know your user name, contact your Internet Service Provider (ISP).

   c. **Dialup Password**. Enter the password required to use the dialup account. If you do not know your user name, contact your Internet Service Provider (ISP).

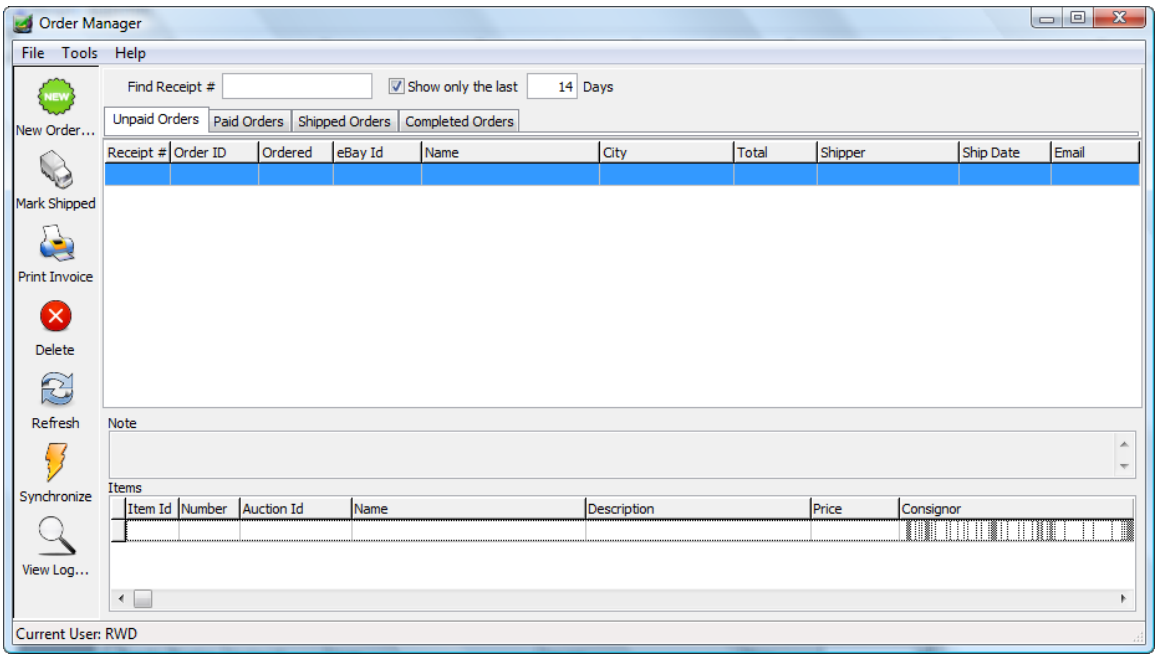
OVERVIEW OF THE ORDER MANAGER

Start → Programs → Liberty4 Trading Assistants → Liberty Order Manager

Liberty handles the entire order process from beginning to end. The **Order Manager** is the central hub for all order related activities. It is used to:

1. Synchronize order, shipping and payment information with both eBay and the Broker,
2. Enter new orders manually,
3. Manage payments from online customers (if you have a physical storefront component to your business use Point of Sale for in store sales instead),
4. Print invoices,
5. Process order shipments,
6. Mark orders as closed,
7. Process refunds, and
8. Set order management preferences.

The **Order Manager** window provides you with full access to all the necessary order manager processes:



In addition to the functions listed along the left side of the window, the Order Manager segregates the order process using four tabs. These tabs allow you to quickly glance at orders and their current status:

1. Unpaid Orders
2. Paid Orders

3. Shipped Orders
4. Closed Orders

Additional Order Status tabs may be created to allow Liberty to be customized to suit the way your organization operates most efficiently. Please see the section entitled Adding a new Order Status for more details.

Following is a brief explanation of these four tabs.

Unpaid Orders Tab

After each **Synchronization** newly completed auctions and orders placed via your storefront are downloaded into Liberty. These newly sold items first appear on the **Unpaid Orders** tab, unless the buyer makes payment via PayPal, in which case the order will appear on the **Paid Orders** tab instead.

> ***Note:*** *The Synchronization process simultaneously launches new auctions and retrieves order information.*

All new, unpaid orders contain the following information:

- The selling price,
- The successful bidder's ID,
- The successful bidder's email address, and
- An order **record**. (If the auction is unsuccessful an order record is **not** created.)

Use the **Unpaid Orders** tab whenever the payment method is check, money order, credit card without using PayPal, etc. In these cases payment information is entered manually, as there is no way the Synchronization process would know this information if the buyer did not go through either eBay's or Marketworks' checkout process.

The **Unpaid Orders** tab is also used to change payment, buyer address, and other miscellaneous information. Details on handling Unpaid Orders are provided in section entitled Editing an Order.

Once you have entered the appropriate payment information and buyer address information, the order is moved to the **Paid Orders** tab.

Paid Orders Tab

When full payment for an item has been received the order status changes from Unpaid to **Paid**. At this point the order moves to the **Paid Orders** tab.

Copyright 2010, Resaleworld.com, Inc.

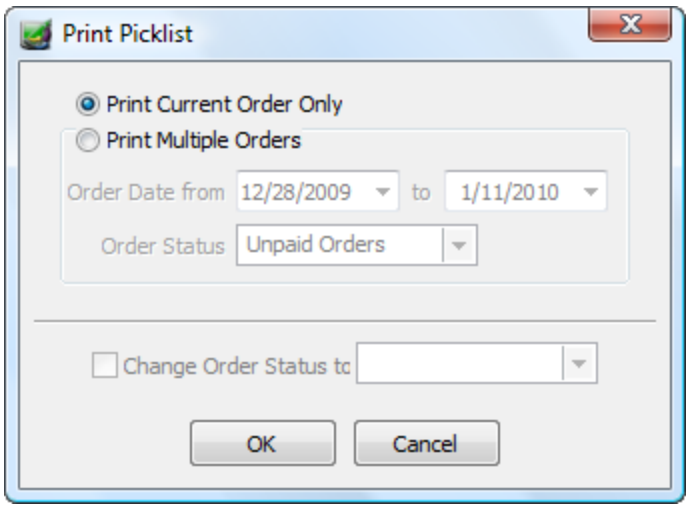
If a buyer uses PayPal to pay for an auction, during Synchronization Liberty will detect the PayPal payment and immediately gives the order a status of **Paid**. In these cases the order skips the **Unpaid Orders** tab.

When payment for the order is not made via PayPal, order information is updated manually.

Once an order attains a status of **Paid** it is ready for shipping. At this point you can print a **Pick List**. The Pick List lists all Paid orders ready for shipment.

To Print a Pick List:

1. From the Order Manager's main menu, select **File** → **Print Pick List**. The **Print Picklist** dialog will display:



2. If printing a Picklist for just the current order, click the **OK** button. If printing Picklists for multiple orders:

    a. Select the **Print Multiple Orders** radio button.

    b. Specify the time period for the Picklist orders to be printed in the **Order Date from and to** fields.

    c. Select the **Status** of the orders for which Picklists are to be printed from the Order Status drop-down.

    d. Click the OK button.

Once an item has been shipped, its status will change to Shipped by using the Mark Shipped routine. This process is described in greater detail in the section entitled Marking an Order as Shipped.

Copyright 2010, Resaleworld.com, Inc.

Shipped Orders Tab

This tab displays all shipped orders. Its purpose is to provide a quick, convenient place to review shipped orders. It is to this location that you will come in order to change an item's status from **Shipped** to **Closed**.

Closed Orders Tab

At some point after an order is shipped the status must be changed to **Closed**. Marking an order as Closed indicates that the order has been delivered and the buyer will not be returning the item. Once an item is given a status of Closed the consignor can be paid for the item.

> ***Note:*** *Consignors cannot be paid until an order is marked as Closed. Likewise, an order cannot be marked as Shipped or Closed unless it has been paid.*

Related Topics

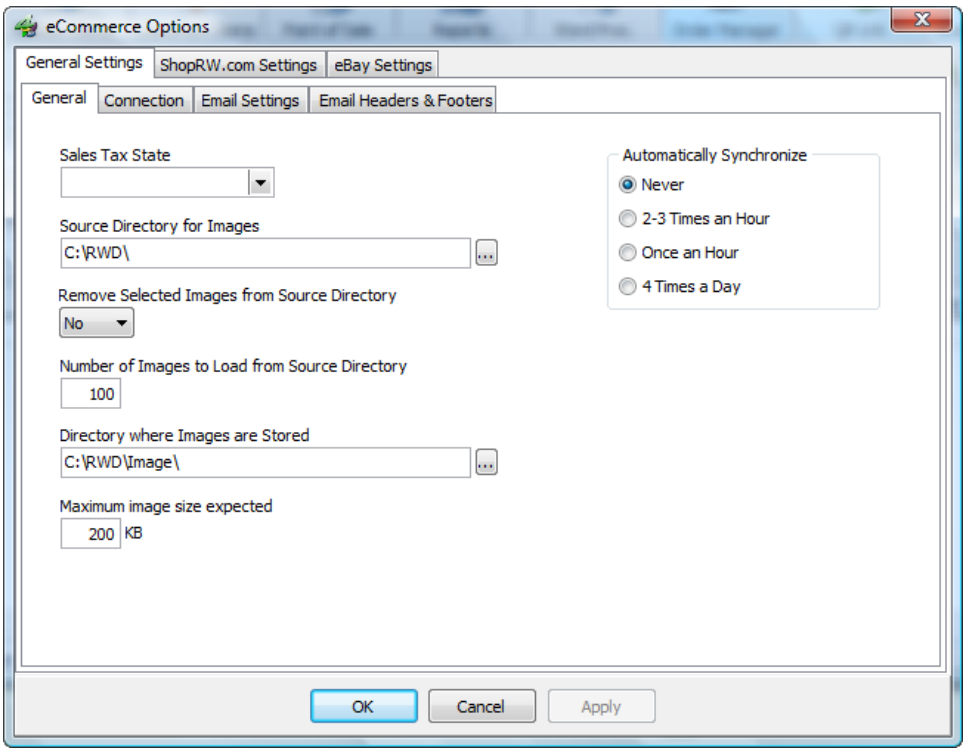
Synchronizing with the Auction Website

Synchronization Error Messages

General Ecommerce Set Up

Inventory Module → Tools → Ecommerce Options → General Tab

Use the **General Tab** of the **Ecommerce Options dialog** to set basic information about your auctions. Many of these settings synchronize with your auction broker account settings. To set or change these options, from the Main Menu select **Tools → Ecommerce Options**. The General Tab will be displayed:



Following is a description of the purpose of each field contained in the General Tab. When finished, click the **Apply** button, then click the **OK** button.

ECommerce – General Tab Fields

Default Duration — Specifies the default auction length (in days) for each auction. This time period may be overridden when items are entered by changing the entry in the **Duration** field, which is contained in the Item Entry dialog.

Starting Price — Sets the default starting price for each item marked as auction. You can override the starting price when entering items.

HTML Template — Use the drop-down menu to select the default HTML template. Using templates will greatly increase the speed with which items are posted online, and provide a consistent, professional format at the same time.

If design your own templates, save them to the **RWD\Auction Templates** folder on your hard drive. Doing so will cause the templates to appear in this field's drop-down menu of choices. You may have as many templates as you desire.

For more information on designing your own templates, please see the section entitled Auction Ads and HTML Templates.

Sales Tax State — Enter the (U.S.) State for which Sales Taxes must be collected.

Copyright 2010, Resaleworld.com, Inc.

eBay Site	Choose the appropriate eBay site to which items will be listed from the drop-down list.
Location	Enter (type) your location (e.g., *Minneapolis, MN*). This information will appear with each item launched on eBay.
eBay Region	Select your eBay region from the drop-down list provided. This will appear on each item launched on eBay. If you do not want to specify a region, select **Do Not Specify a Region** from the drop-down.
eBay Country	Select the country you are located in from the drop-down list provided. This information will appear on each item launched on eBay.
eBay Currency	Select the currency used for online transactions from the drop-down list provided.
Camera Directory	Specify the default location where Liberty should look when attaching photos to items. The drive and directory selected will be displayed when the **Load Photos** button is selected, which is located in the **Photos** tab in item entry. An example of a drive might be **E:** if you are loading photos directly from a smart card or other external device, or **A:** if you are copying photos from a floppy disk (such as with a Sony Mavica or similar digital camera). Both a drive and directory might be selected when you are editing photos prior to loading them into Liberty. An example might be **C:\Adobe\Photoshop\Auction_Photos**.
Remove Images?	You have the option of deleting images once they have been loaded into Liberty. Check this box off if you want to permanently erase the image once it has been assigned and copied from your **Camera Directory** path.
Number of Images to Load from Camera Directory	Sets a limit on the number of images loaded to prevent having to look at too many images at one time.
Image Path	This is the directory in which photos are stored once assigned to an item. The default image directory is **C:\RWD\Image** on the server. It is recommended that this directory not be changed. If the directory is changed be sure the path entered is valid. If the path is not valid eBay will return a ***Serious Error*** message and items will not be posted.

Copyright 2010, Resaleworld.com, Inc.

IMPORTANT NOTE: When running Liberty on a network, the image path on client PC's is different. Whereas on the server it is **C:\RWD\Image**, on the workstations (client PCs) it must be **X:\Image**, with **X:** representing the network drive letter mapped to the RWD directory on the server. For example, if the drive letter **H:** represents the **C:\RWD** drive and folder on the server, then **H:\Image** should be entered as the drive path.

Note that Liberty renames images as they are assigned to items. For instance, if the item number is "2134", and 4 images are assigned, Liberty will create 4 files called "2134a.jpg", "2134b.jpg" and so on.

Preview Image Size

Preview images are the images embedded within your auction text. Click the appropriate radio button to select the default size of how images should appear in your ad.

If you indicate a **Height** of **0** in the image size preview text box, your image size will be proportionately spaced according to the width. (The size parameter format is **Width x Height**, so height is the second number)

You can have up to four preview image size selections.

Important Notes:

1. Most eBay auctioneers opt to use smaller pictures in their auction text and allow users to click on those pictures for greater detail. This reduces download time for users, leading to a faster, more pleasant shopping experience.
2. If the Thumbnail Previews appear warped or stretched in your auction listings, it is due to the way the images are being auto-sized through HTML. To fix this problem, set the first number of the Preview Image Size to 0 (zero). This allows the HTML code to auto-size the image but without forcing into the constraints of the smaller image size.

Show Click to Enlarge

Check this box to display fly-over help stating **Click to Enlarge** when the mouse cursor passes over the image as shoppers view images online.

Copyright 2010, Resaleworld.com, Inc.

SET UP MARKETPLACE OPTIONS

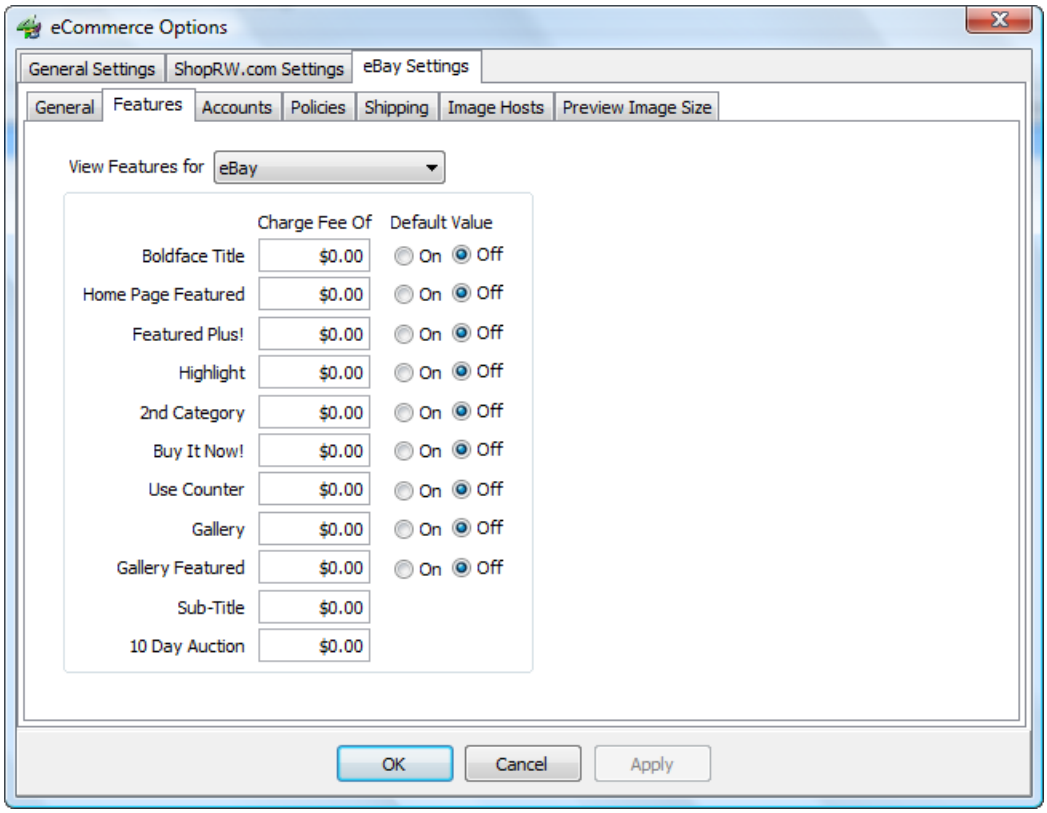
Inventory Module → Tools → Ecommerce Options → Marketplace Tab

Use the **Marketplace Tab** of the **Ecommerce Options dialog** to select a Broker for each Marketplace you sell in. It is also used to set the fees you will charge to consignors (sellers) for services provided by the Broker, such as Boldface Titles, Sub-Titles, etc.

If eBay is the Marketplace where items will be sold, then eBay will be the Broker. If you wish to use a 3rd party Broker, currently Marketworks is the only other Broker supported.

To Set Up Marketplace Features for a Particular Broker:

1. From the Main Menu, select **Tools** → **Ecommerce Options**, then click on the **eBay Settings** tab. Click the **Features** tab:



2. Click on the **View Feature For** drop-down and select the Marketplace to which you

wish to make changes.

3. If you choose eBay as the Broker, use the **Charge Fee Of** fields to set the prices to be charged to consignors for various **Marketplace Features**. These fees are charged when one of these options is selected for an auction. Marketplace Features are currently only enabled for the eBay marketplace. At present there are no features available for the AW Store or eBay Motors.

   The purpose of this fee set up is it allows you to pass on auction feature fees at prices that you set, rather than at prices eBay sets. Whatever price you enter is the amount that will be charged to consignors.

   > ***Note:*** *When fees are charged in this manner, a charge will be created on the client's* ***Transaction*** *tab for each Feature for which they are charged a fee.*

4. The **Default Value** (Yes/No) fields allow you to specify the default Feature Value for each auction as each item is entered. The purpose is to save time. For instance, if you usually use Sub-Titles then it makes sense to default this feature to **On**.

   When a feature's default is set to **ON**, that feature will be automatically turned on for every new auction entered. You do have the ability to turn the option off once it has been added to that item during the item entry process, as these features are listed on the **Auction Info** tab in Item Entry.

5. When finished, click the **Apply** button, then click the **OK** button.

ECOMMERCE ACCOUNTS AND BROKERS SET UP

Inventory Module ➔ *Tools* ➔ *Ecommerce Options* ➔ *Accounts Tab*

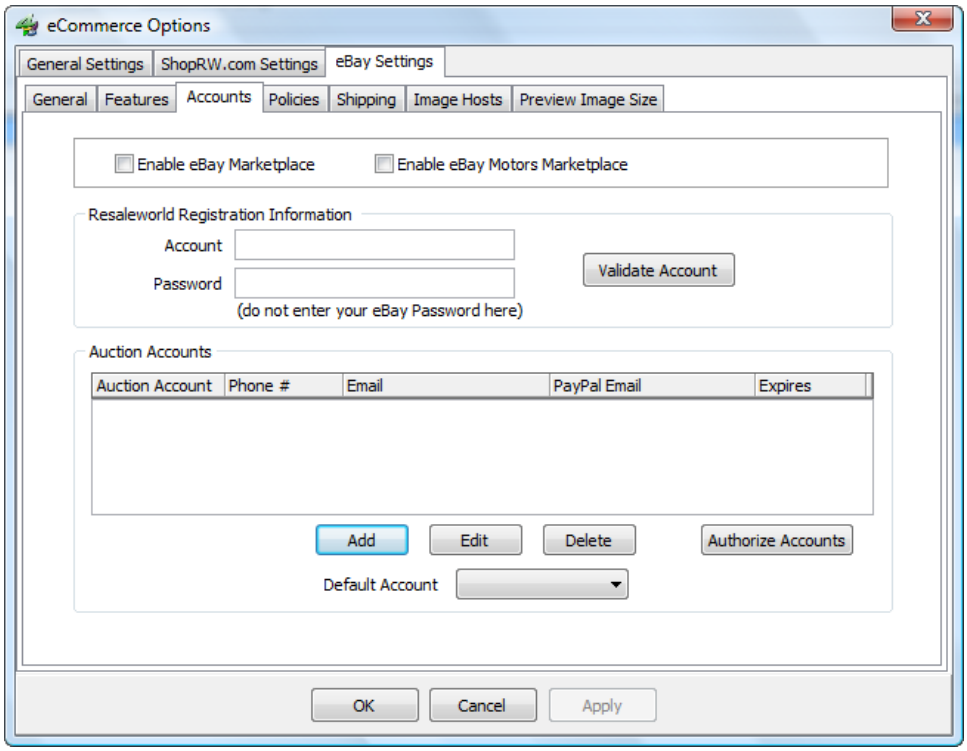
Use the **Accounts Tab** of the Ecommerce Options dialog to specify Broker account information. If eBay is the Marketplace where items will be sold, then eBay will be the Broker. If you wish to use a 3rd party Broker, currently Marketworks is the only other Broker supported.

Copyright 2010, Resaleworld.com, Inc.

Note: *You MUST HAVE a valid auction account already established before you can upload auctions and synchronize auction results.*

To Set Up Broker Accounts

1. From the Main Menu, select **Tools** → **Ecommerce Options**. Click the **eBay Settings** tab ands then click on the **Accounts** tab.



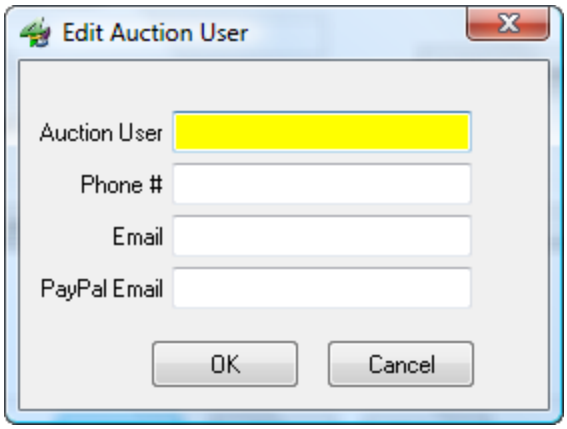
2. Enter the **Account** and **Password** in their respective fields. These are both provided by Resaleworld.

3. The **Auction Accounts** area at the bottom of the dialog is used to set up eBay auction accounts to which items are posted. It is required that you have an auction account created in eBay in order for the ECommerce module to work. To add an Auction Account perform the following steps:

Copyright 2010, Resaleworld.com, Inc.

To Set Up a New Account

1. Click the **Add** button. The **Edit Auction User** dialog displays.



2. Specify the account username in the Auction **User** field.
3. Enter the **Phone Number** in the Phone Number field.
4. Enter a contact **Email** address for auction viewers to communicate via in the Email field.
5. If you allow users to pay by PayPal, enter the PayPal email address in the PayPal **Email** field. Otherwise leave this field blank.
6. Click **OK** to return to the Accounts tab.
7. If you have multiple auction accounts, use the **Default Account** drop-down to specify which account you would like new consignor accounts to default to using. You may override this account in the consignor screen.

eBay Authorization Utility

For Liberty to interface with eBay it is necessary to become authorized by eBay. This process need only be completed once for each Auction Account.

Copyright 2010, Resaleworld.com, Inc.

To Authorize with eBay

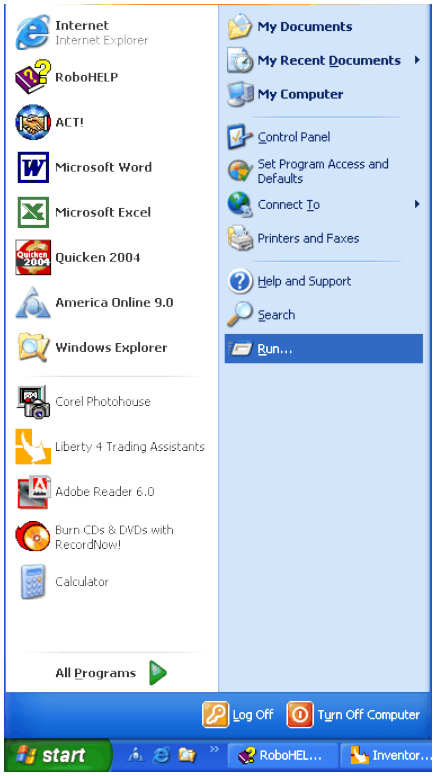
1. The following **Required Set Up Steps** must be completed:

   a. **All** information entered into the **Ecommerce Options** → **Accounts** tab, which is located under **Inventory Module** → **Tools** → **Ecommerce Options** → **Accounts** tab.

   b. All information entered into the **Ecommerce Options** → **Connections** tab, which is located under **Inventory Module** → **Tools** → **Ecommerce Options** → **Connections** tab.

   c. Make sure the Internet connection is up and running.

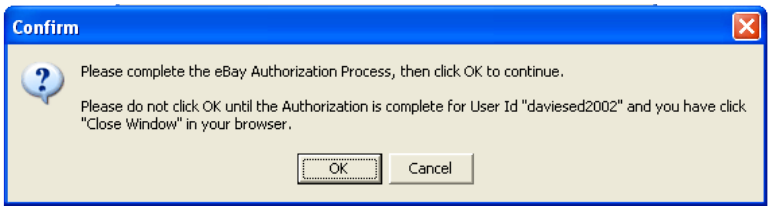
   d. Select **Start** → **Run**. The **Run** dialog will display:



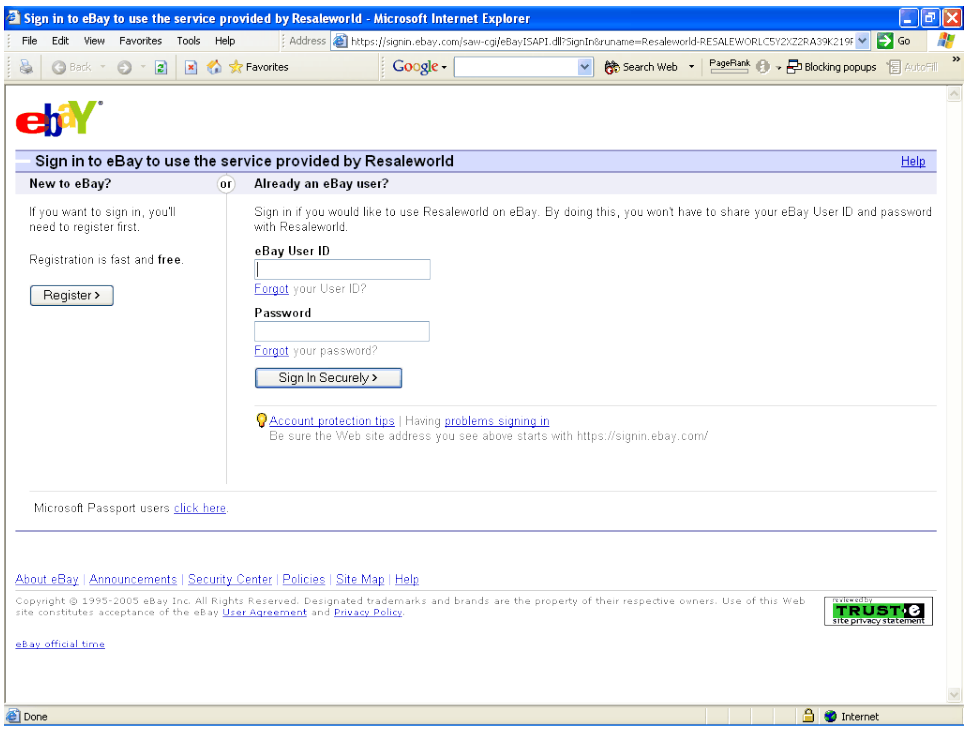
   e. Enter **c:\rwd\ebayauthutil.exe** and click **OK**. The first **eBay Account Authorization Utility** dialog will display:

eBay Account Authorization Utility - PRODUCT...
In order for Resaleworld to interact with eBay on your behalf you must complete the eBay Authorization process. Select the Account to authorize and click the button below to Authorize the account.
Auction Account
daviesed2002
Authorize Account
Close

f. Select the correct Auction Account from the drop-down provided, then select the **Authorize Account** button. A confirmation dialog will display:

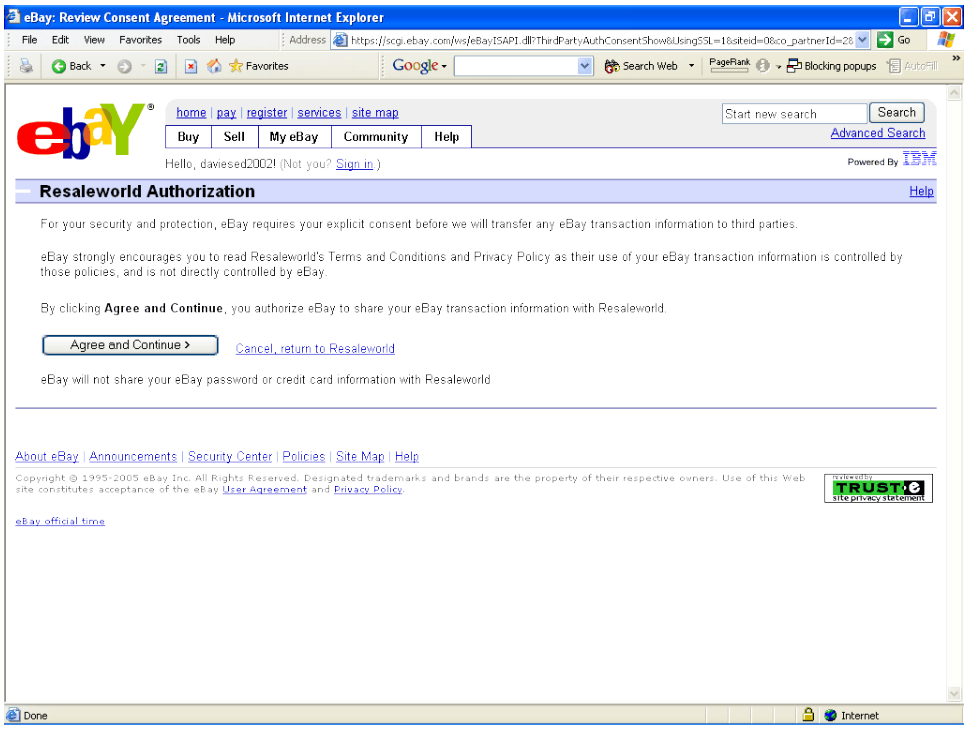

Confirm
Please complete the eBay Authorization Process, then click OK to continue.
Please do not click OK until the Authorization is complete for User Id "daviesed2002" and you have click "Close Window" in your browser.
OK
Cancel

g. Click **OK** to proceed. Wait while you are connected to eBay. The eBay Login screen will display:

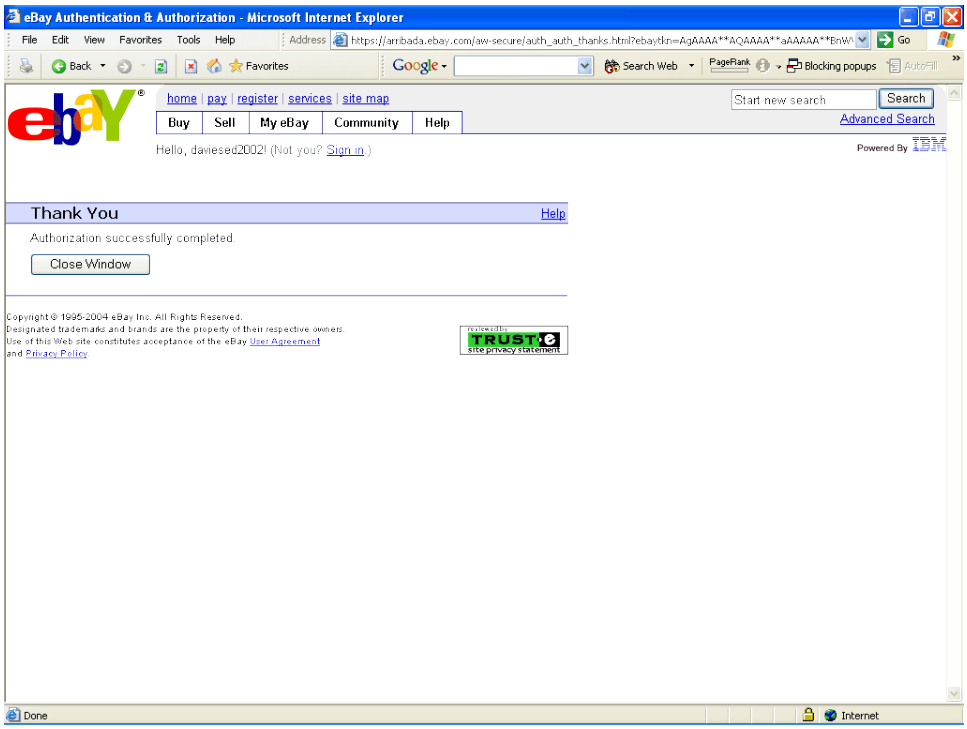

Sign in to eBay to use the service provided by Resaleworld - Microsoft Internet Explorer
Sign in to eBay to use the service provided by Resaleworld
Help
New to eBay?
Already an eBay user?
If you want to sign in, you'll need to register first.
Registration is fast and free.
Register >
Sign in if you would like to use Resaleworld on eBay. By doing this, you won't have to share your eBay User ID and password with Resaleworld.
eBay User ID
Forgot your User ID?
Password
Forgot your password?
Sign In Securely >
Account protection tips | Having problems signing in
Be sure the Web site address you see above starts with https://signin.ebay.com/
Microsoft Passport users click here.
About eBay | Announcements | Security Center | Policies | Site Map | Help
eBay official time
Done
Internet

h. Login with your user name and password. The **Resaleworld / eBay**

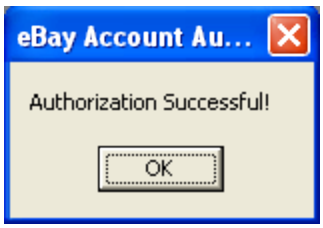
Authorization screen will display.


eBay: Review Consent Agreement - Microsoft Internet Explorer
Resaleworld Authorization
For your security and protection, eBay requires your explicit consent before we will transfer any eBay transaction information to third parties.
eBay strongly encourages you to read Resaleworld's Terms and Conditions and Privacy Policy as their use of your eBay transaction information is controlled by those policies, and is not directly controlled by eBay.
By clicking Agree and Continue, you authorize eBay to share your eBay transaction information with Resaleworld.
Agree and Continue >
Cancel, return to Resaleworld
eBay will not share your eBay password or credit card information with Resaleworld

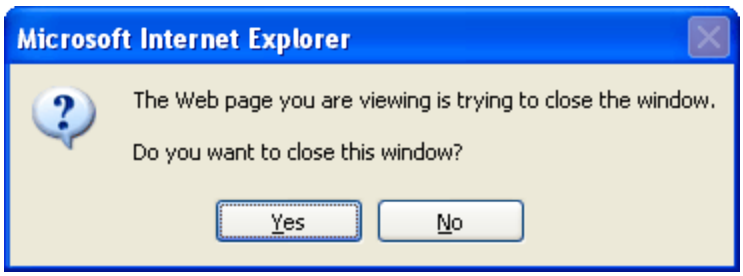
i. Select the **Agree and Continue** button. Wait while the authorization process is performed. Please be patient – this may take a little while. Do not abort the process during this time. When the process has finished the following screen will display:



j. Click the **Close Window** button. You should receive the following message:



After selecting the Close Window button, you may see the following window:


Microsoft Internet Explorer
The Web page you are viewing is trying to close the window.
Do you want to close this window?
Yes
No

If you do, click the **Yes** button.

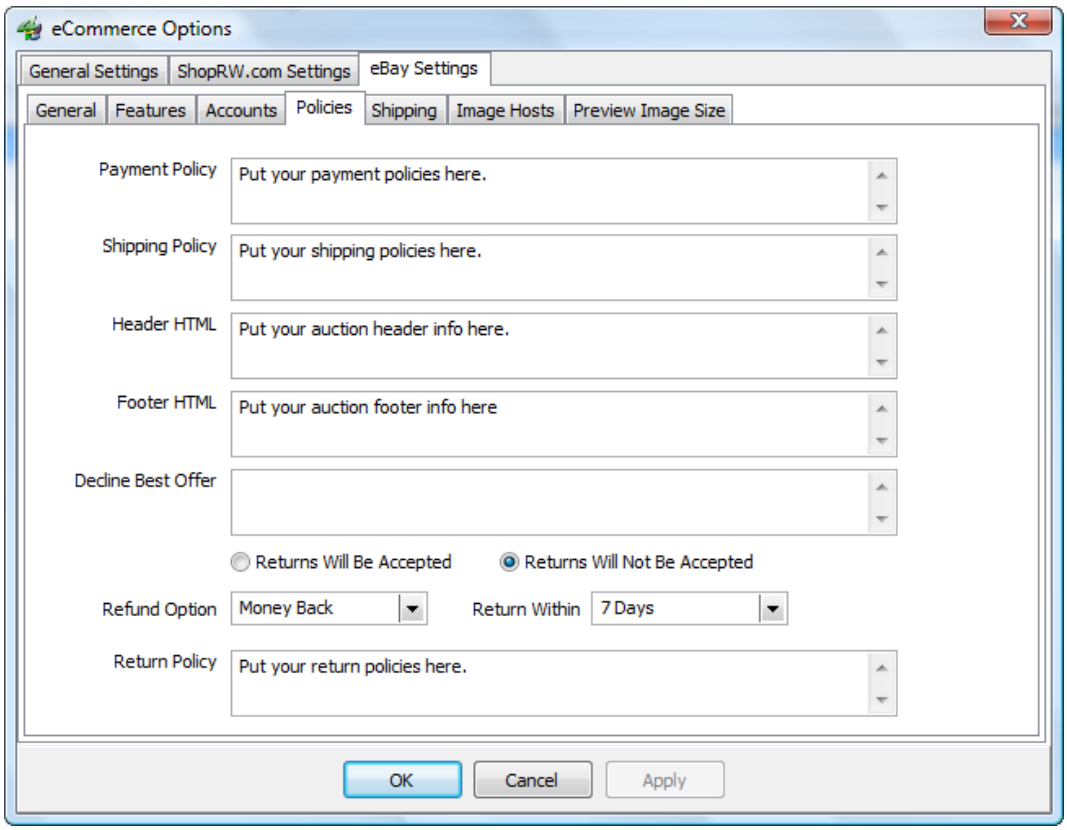
SET UP ECOMMERCE POLICIES

Inventory Module → *Tools* → *Ecommerce Options* → *Policies Tab*

Use the **Policies Tab** of the Ecommerce Options dialog to communicate your auction policies to customers. Information entered in these fields is inserted automatically into the Auction Ad. The information can be entered using text or HTML. The **Tag** names which you can use for your template are located in the Appendix.

To Enter Ecommerce Policies:

1. Select **Tools** → **Ecommerce Options** and click on the **eBay Settings** tab. Select the **Policies** tab:



2. Following is a description of the purpose of each field contained in the Policies Tab. When finished, click the **Apply** button, then click the **OK** button.

   - **Payment Policy.** Enter your payment policy here. This is a good place to list both the types of payments the store will and will not take.
   - **Shipping Policy.** Enter your shipping policy here.
   - **Header HTML.** Enter your auction header. This usually contains general information about your company, and appears at the top of each auction.
   - **Footer HTML.** Enter your auction footer. This usually contains general information about your company and appears at the bottom of each auction.
   - **Decline Best Offer.**
   - **Returns Will/Will Not Be Accepted.** Use the radio buttons to indicate whether or not items can be returned.
   - **Refund Option.** If returns will be accepted, use this drop-down to select the options for refunding the buyer's money.
   - **Return Within.** If returns will be accepted, use this drop-down to indicate the time period during which returns will be allowed.

Copyright 2010, Resaleworld.com, Inc.

- **Return Policy**. Enter your return policy here. Being descriptive and precise in laying out this policy will save a lot of time and trouble later.

Note: *Text may be customized in these fields by using HTML tags. If you have created your own customized auction templates you will need to insert the proper HTML tags. For more information, please see the section entitled Auction Ads and HTML Templates.*

Related Topics

Auction Ads and HTML Templates

SET UP ECOMMERCE SHIPPING OPTIONS

Inventory Module ➔ *Tools* ➔ *Ecommerce Options* ➔ *Shipping Tab*

Items entered into inventory for auctioning require shipping information be provided with the auction. This information is entered on the **Shipping Info** tab, which is under the **Auction Info** tab of the **Item Entry** dialog.

To speed item entry, rather than enter detailed shipping information every time an item is entered, you may set certain shipping defaults. This is accomplished in the **Shipping Tab** of the **Ecommerce Options** dialog. You may set the default shipping methods for both **Flat Rate Shipping** and for **Calculated Shipping**, as well as create other shipping profiles.

Creating additional **Shipping Profiles** is highly recommended. Doing so will greatly speed the process of entering items for uploading to an auction web site. For example, creating a Shipping Profile for larger items that exceed the girth requirements for standard UPS shipping will make entering such items go faster. Another example would be to use one profile for shipping a single item to a customer, and another profile for shipping multiple items to a customer.

It helps to understand the definition of two terms:

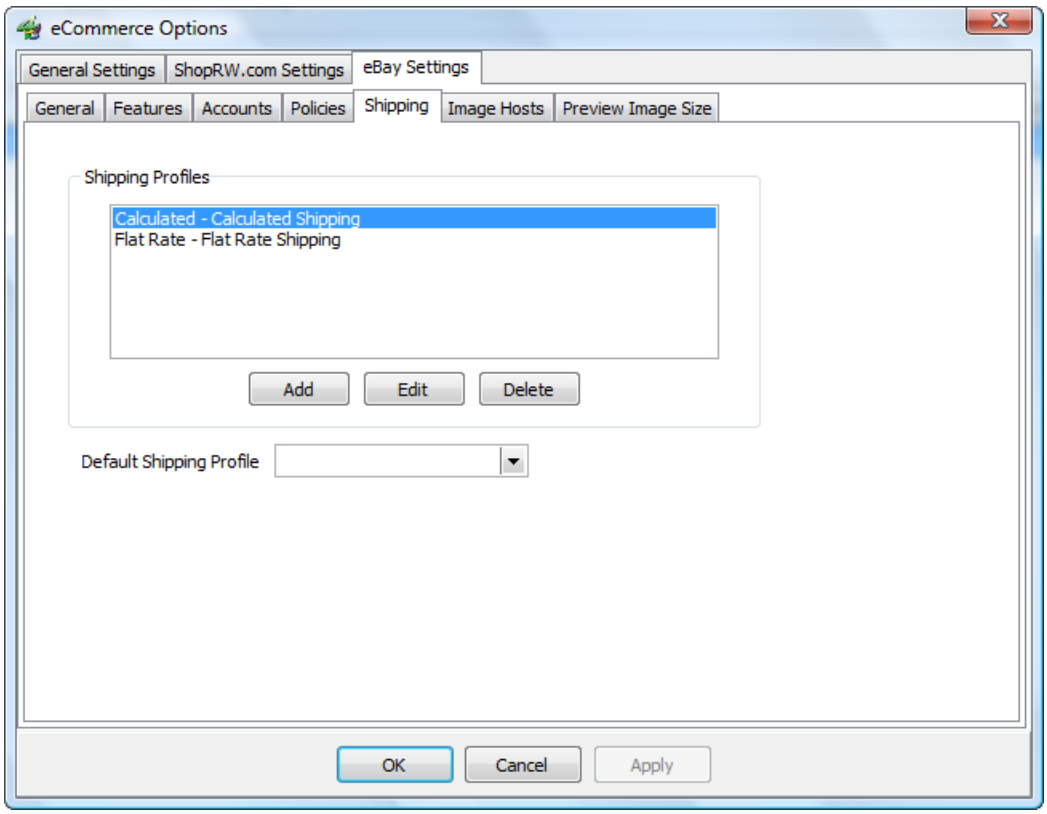
1. **Flat Rate** means the shipping fee is the same no matter where the purchaser is located within the U.S.

2. **Calculated Rate** means the amount of the shipping fee will depend on the shipping company's charge for shipping from your location to the purchaser's.

When you indicate the method of shipping when adding your item, Liberty will send the selected shipping information to eBay based on these values.

To Edit or Add Shipping Defaults:

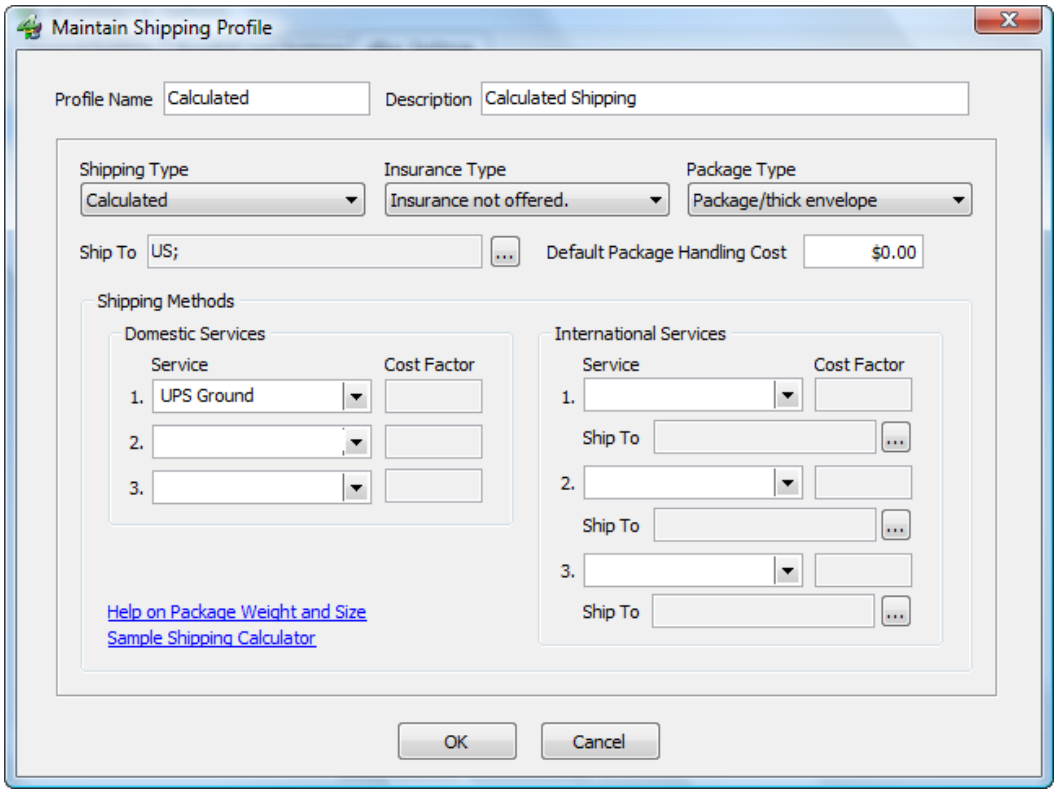
1. Select **Tools** → **Ecommerce Options** and click on the **eBay Settings** tab. Click the **Shipping** tab:



   a. If editing an existing Shipping Profile, highlight the **Shipping Profile** to be edited (**Flat Rate** of **Calculated**), then select the **Edit** button.

   b. If adding a new Shipping Profile, select the **Add** button instead.

In either case, the **Maintain Shipping Profile** dialog will display:

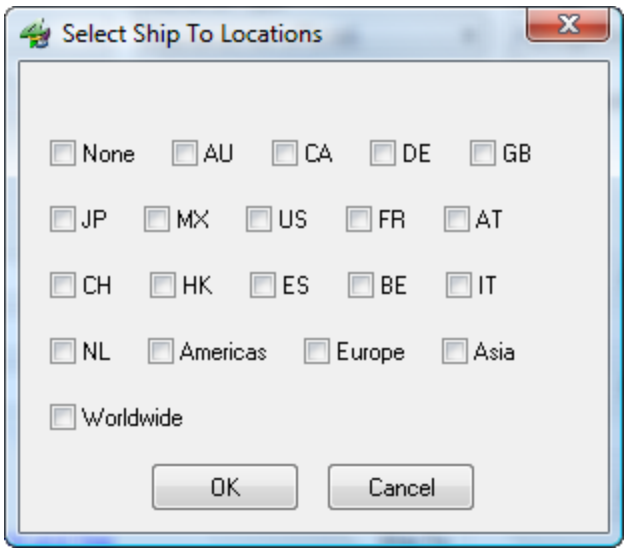


2. If adding a new **Shipping Profile**:
    a. Give the Profile a name in the **Profile Name** field,
    b. Enter a description in the **Description** field, and
    c. Select **Fixed Rate** or **Calculated** from the **Shipping Type** field.
3. In the **Insurance Type** field, make the appropriate selection from the choices listed in the drop-down. The choices are:
    a. Insurance not offered.
    b. Insurance optional.
    c. Insurance required.
    d. Insurance included in Shipping and Handling fee.
4. When editing a **Calculated Shipping Type**, the **Package Type** field is activated. Select the appropriate choice from the choices listed in the drop-down (Letter, Large Envelope, etc.)

Copyright 2010, Resaleworld.com, Inc.

Note that when an item is entered into inventory and Calculated Rate is selected, the weight, length, width and height of the shipment must be entered. (This is information is entered on the **Shipping Info** tab, which is under the **Auction Info** tab of the **Item Entry** dialog.)

5. Enter the desired amount in the **Default Package Handling Cost** field.
6. In each of the three **Domestic Service** fields, select a type of service from the drop-down menu. Note that under **Domestic Services** three different types of **Service** may be selected. It makes sense to choose the service most likely to be selected in the first field (1.), etc.
7. If you ship internationally, repeat the previous step for the **International Services** fields.
    a. Use the **Ship To** fields to specify where shipments may and may not be sent. Do so by clicking on the browse button to the right of the **Ship To** field. Upon doing so the **Select Ship To Locations** dialog will display:



    b. Check the appropriate boxes, then select the **OK** button.
8. The **Cost Factor** fields are only used for Flat Rate shipping. They allow a multiplier to be used when calculating and displaying the shipping cost online. For instance, the shipping charge for a regular sized book via US Priority might be $5.00. The charge for shipping the book overnight via UPS Next Day Air Saver might be $15 – three times as much. In this case the **Cost Factor** would be set to 3.00
9. When finished, click the **OK** button and exit to the Shipping dialog.
10. Select the default Shipping Profile in the **Default Shipping Profile** field.
11. Select the **OK** button when finished.

Copyright 2010, Resaleworld.com, Inc.

SET UP EBAY SETTINGS

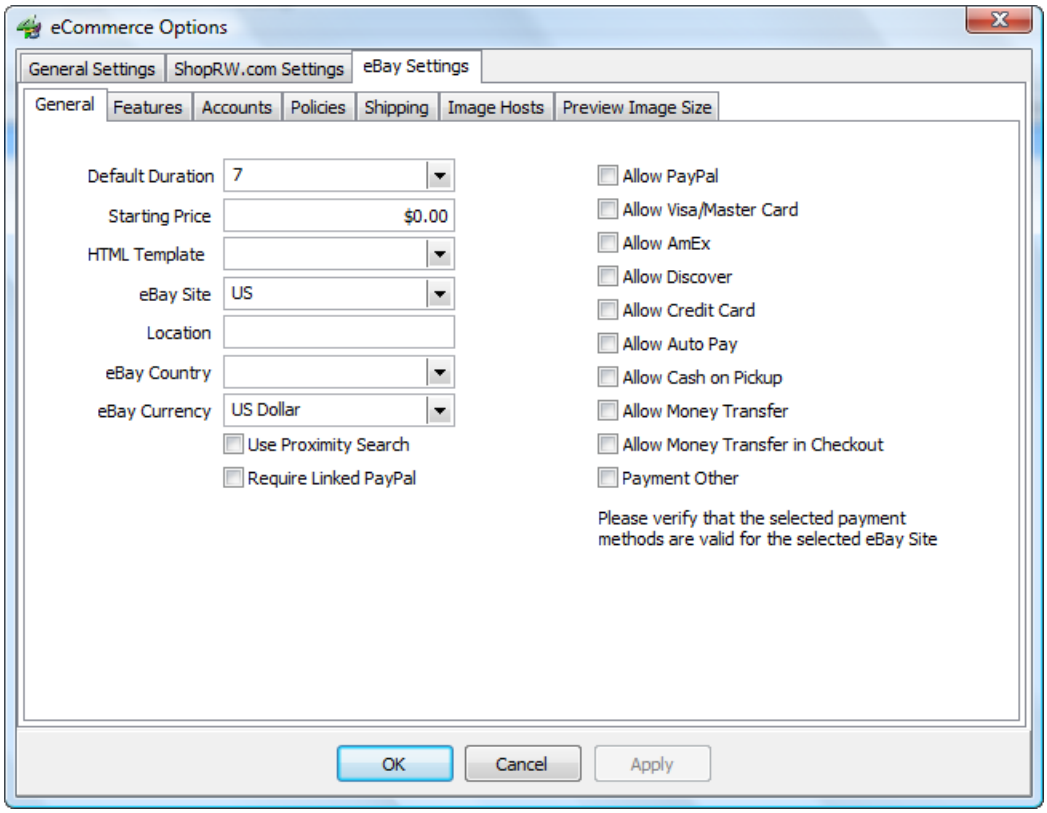
Inventory Module → Tools → Ecommerce Options → eBay Payments Tab

Use the **eBay Settings** tab of the **Ecommerce Options** dialog to specify which payment methods are allowed during the eBay checkout process. These options will be advertised in the Auction Ad in the payment area.

> ***Note:*** *The Payment Area of the Auction Ad is automatically populated with the information specified here as part of Liberty's integration with eBay. This payment information is thus not a part of the HTML Template.*

To Set eBay Payment Options:

1. Select **Tools** → **Ecommerce Options**, then click on the **eBay Settings** tab:



2. Check the payment types you will accept. The payment options selected will be advertised on your auction in the payment area. Be sure to verify that the payment methods selected are valid for the selected eBay site.

> ***Note:*** *While Liberty has no control over whether orders from* ***Unconfirmed*** *PayPal users are accepted, it is possible to set your PayPal Payment Preferences to one of three options:* ***Always Block****,* ***Always Accept****, or* ***Ask Me****. For more information see the PayPal web site.*

3. The **Store Category** names are only used when you are selling items through an eBay storefront. Use the Store Category Names to specify eBay Store Categories or Sections.

> ***Note:*** *eBay allows up to 20 store categories. Nineteen of these store categories can have names and one is reserved for "Other".*

Related Topics

Auction Ads and HTML Templates

SET UP IMAGE HOSTING

Inventory Module → *Tools* → *Ecommerce Options* → *Image Hosts Tab*

When images are assigned to an auction, as part of the auction listing process the images must be uploaded to a hosting service. Use the **Image Hosts** tab to specify the hosting service you wish Liberty to automatically transfer images to.

> ***Note****: If you intend to use Resaleworld's Image Hosting Service it is not necessary to do anything with this dialog. See the section below, however, if you are using Resaleworld's image hosting service and you intend to list items with a duration of greater than 30 days.*

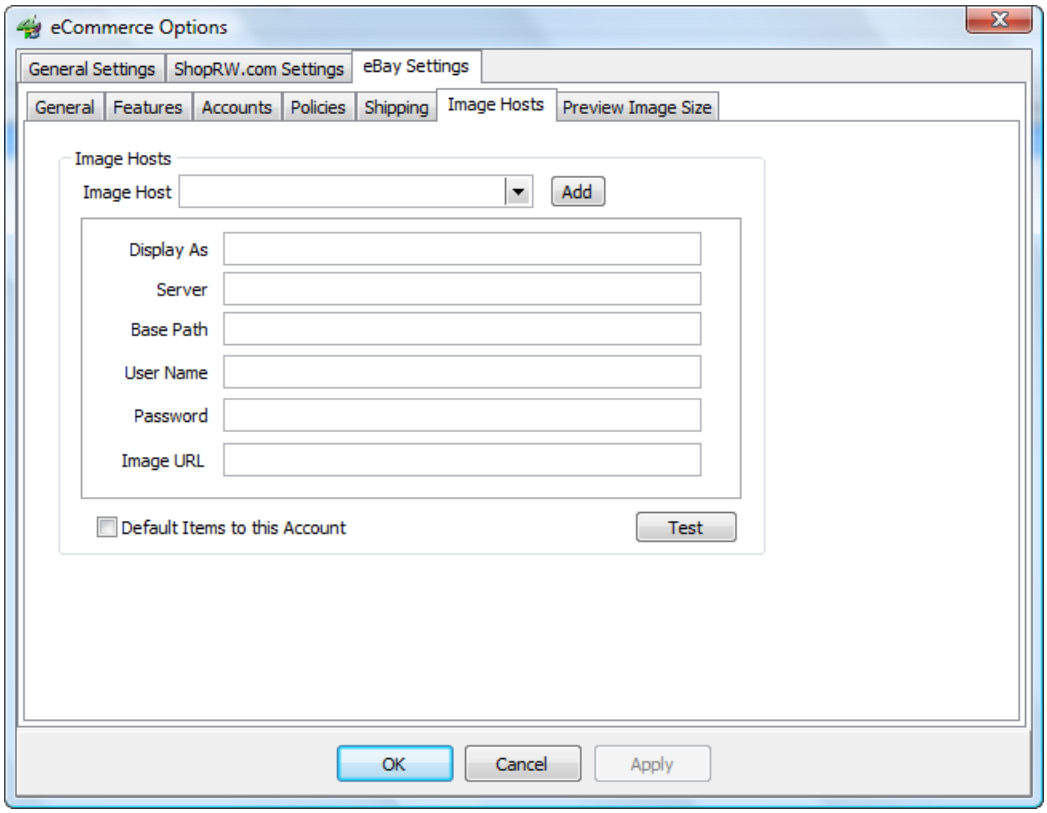
By default, all images will go to Resaleworld's servers for hosting, however, the Image Hosts settings allow you to specify other Image Hosting services.

Copyright 2010, Resaleworld.com, Inc.

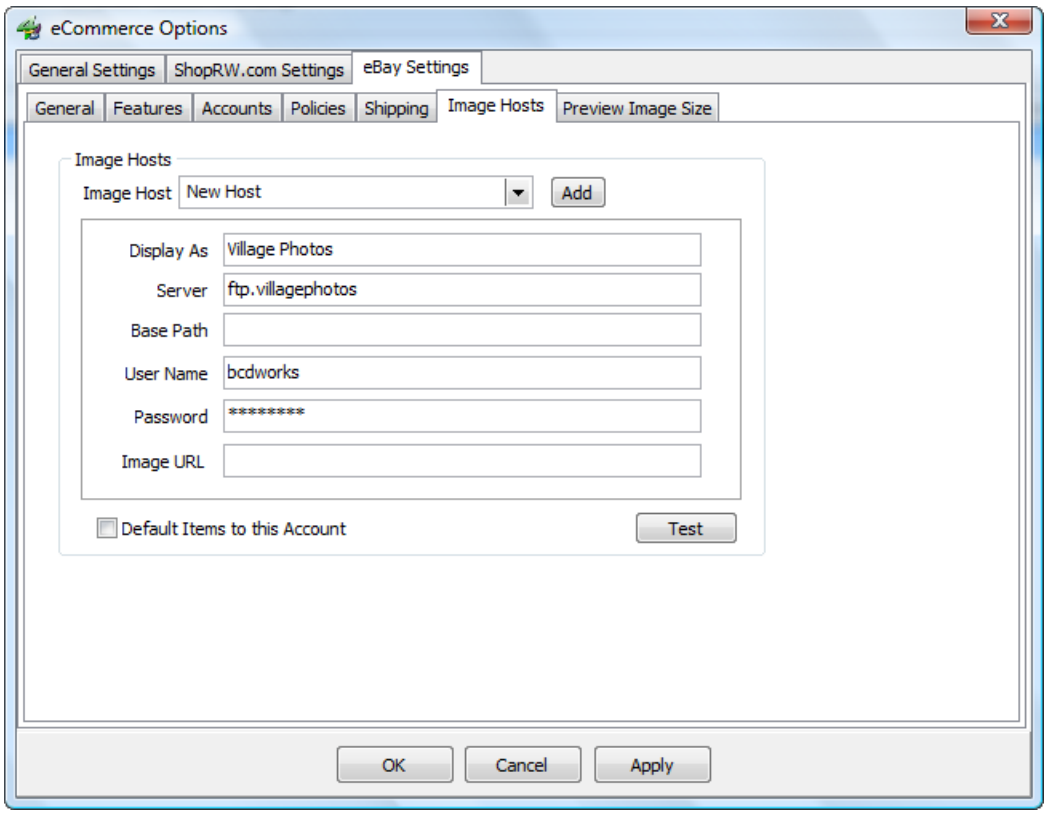
(If you are not familiar with Image Hosting, skip this section until you become more familiar with images and how they are linked to auctions.)

To Specify Image Hosting Services:

1. Select **Tools** → **Ecommerce Options**, click on the **eBay Settings** tab and then click on the **Image Hosts** tab. The following dialog will displays:



2. Click the **Add** button and assign a name to your service. In our example below, we have used *Villagephotos* as the third-party image hosting service.



Please note that it is absolutely necessary that your image hosting service allows FTP file transferring in order for you to take advantage of the image hosting feature.

3. In the **Display As** field, enter a name for the hosting service. This name will appear during the item entry process.

4. In the **Server** field, enter the server's FTP domain name here. This usually starts with the characters **ftp**. before the image hosting server's main domain name. If your service does not provide you with an FTP domain name, most likely they do not support FTP file transferring and you will not be able to use it with Liberty.

5. In the **Base Path** field, enter the directory which will hold your photos. Some image hosting services do not require that you add a base path for your images, in which case you would leave this field blank.

6. In the **User Name** field enter your login name for the hosting service. Most image hosting services require this – if yours does not, leave this field blank.

7. In the **Password** field enter the password you use for your Image Hosting service.

8. The **Image URL** field is used to specify the URL by your Image Hosting Service to your images. Many image hosting services will create a specific directory for you. You must enter that directory name here so that images will be linked correctly from within your auction templates.

9. Use the **Default Items to this Account** checkbox to make all new items entered default

Copyright 2010, Resaleworld.com, Inc.

to this image hosting service.

In order to make sure you have configured your image hosting correctly, click the **Test** button located at the bottom right of the dialog. If you click this button and an image appears in your browser, you have successfully configured your image hosting.

Hosting Images with Resaleworld Longer Than 30 Days

When using Resaleworld to host images, items with a listing period (**Duration)** greater than 30 days must be flagged as **Read Only** via your Broker Management/Image Host page so they will not be purged.

To make this change, go to http://pictures.macrosysinc.net/Pages/Login.aspx. You will need your Resaleworld **Broker ID** to log on to this web site. This Broker ID is located on the Accounts tab under **Liberty Inventory** → **Tools** → **Ecommerce Options**.

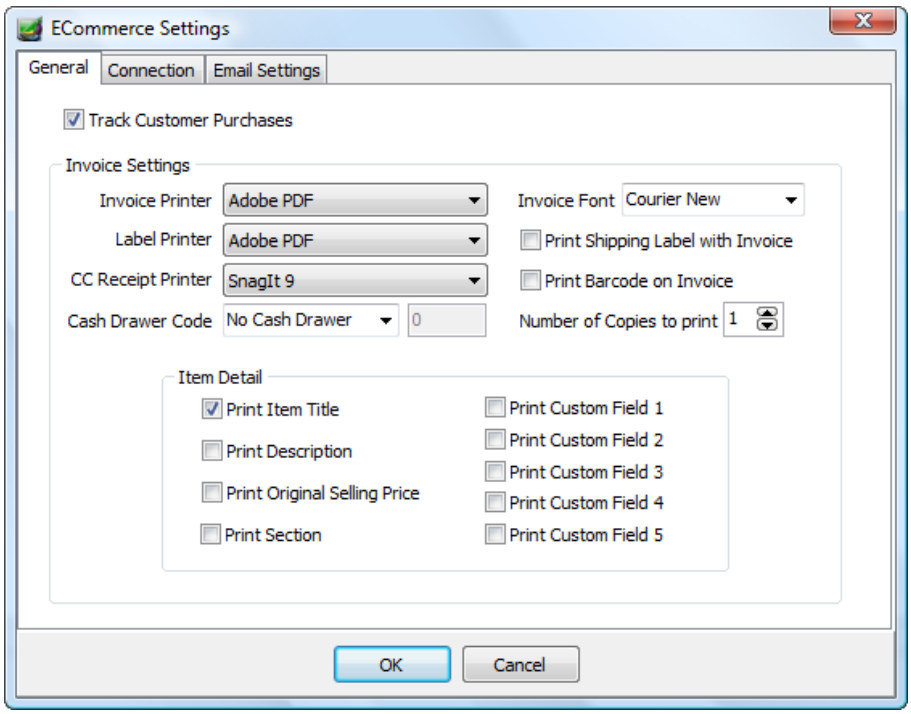
Once you are logged in, you should see a link towards the top of the page that says **My Files**. Click on this to access your images. Once this page loads, click on the button that says **Get File List** to see a list of your currently hosted images. For each of these images, there is an option that you can toggle on or off - Read Only. When this is set to **On**, the image(s) are set to Read Only and will not be deleted after 30 days.

SET INVOICING PREFERENCES

Order Manager → *Tools* → *Options* → *General Tab*

To Set Invoice Preferences:

1. Start the **Order Manager** (**Start** → **Programs** → **Liberty4 Trading Assistants** → **Order Manager**.)
2. Select **Tools** → **Options**. The **General** tab will display:



3. To track customer purchases, click on the **Track Customer Purchases** check box so a check appears. When this capability is activated, a new client account will be created using the Buyer's information.
4. Select the appropriate printers from the drop-downs for the
    a. Invoice Printer,
    b. (Shipping) Label Printer, and
    c. CC (Credit Card) Receipt Printer.
5. If items are being sold from a physical store as well as online by using the **Point of Sale** module, select the type of Cash Drawer being used from the drop-down provided. If the cash drawer is not listed, select **Other** and enter the appropriate code in the field to the right of the drop-down.
6. Select the font to use when printing invoices from the **Invoice Font** drop-down.
7. Place a check in the **Print Shipping Label with Invoice** check box if appropriate.
8. Place a check in the **Print Barcode on Invoice** check box if appropriate (recommended – see the section entitled Shipping Multiple Orders for more information about the benefits of printing invoices with a bar code.)
9. Select the number of invoice copies to print in the **Number of Copies to print** field.
10. In the **Item Detail** sub-panel select the information to print on invoices by placing a check in the desired field's check boxes. Custom fields appear in the Item Entry window

Copyright 2010, Resaleworld.com, Inc.

along with the other fields listed.

11. Select **OK** when finished.

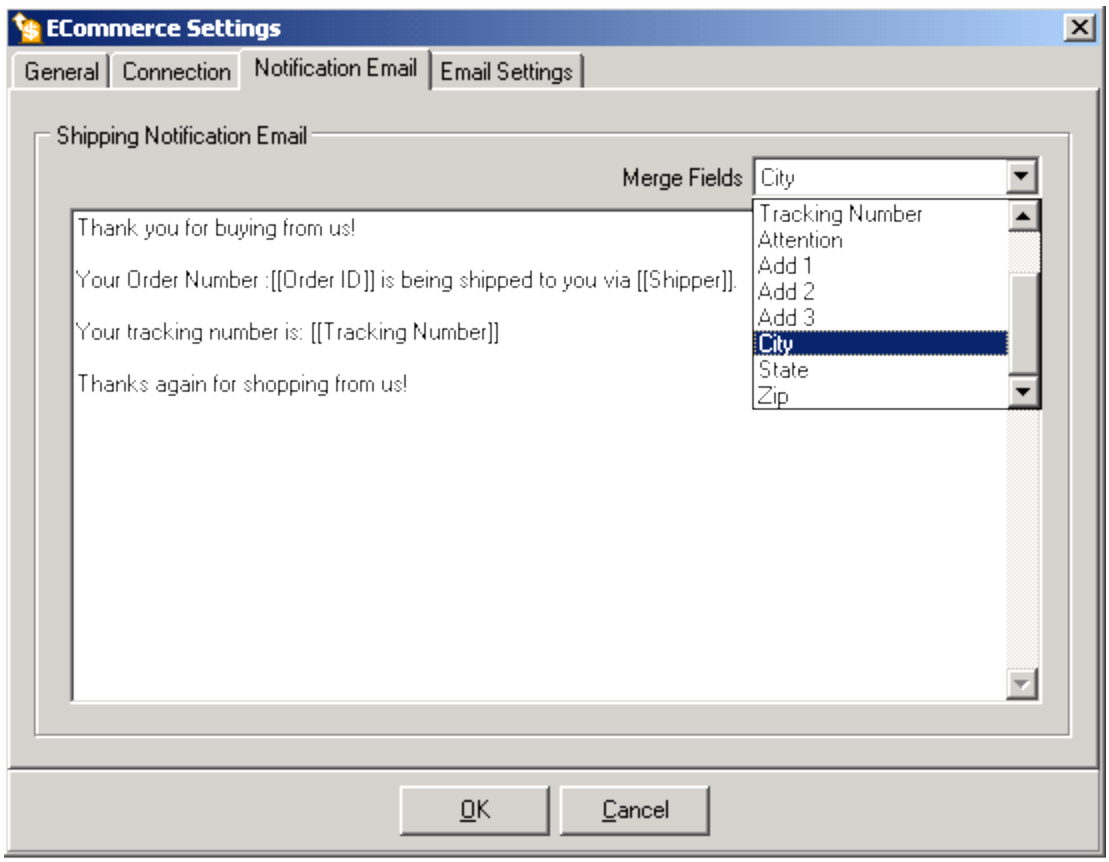
SET CUSTOMER NOTIFICATION EMAIL PREFERENCES

Order Manager → Tools → Options → Notification Email Tab

When orders are shipped an email may be sent to the buyer informing them of the date shipped, their order number, and the tracking number.

To Customize the Customer Notification Email:

1. Start the **Order Manager** (**Start → Programs → Liberty4 Trading Assistants → Order Manager**.)
2. Select **Tools → Options → Notification Email** tab. The display will look as follows:



3. Change the email to suit your preferences. Use the **Merge Fields** drop-down menu to insert additional information.
4. Select **OK** when finished.

Related Topics

Sending Automated Emails with the Event Manager

ORDER STATUS PREFERENCES

Order Manager ➔ *Tools* ➔ *Maintain Order Status List*

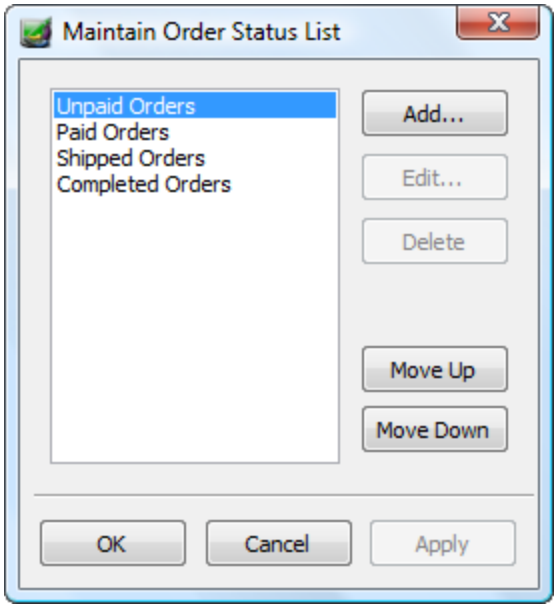
Liberty comes setup with four **Order Statuses**:

- Unpaid Orders
- Paid Orders
- Shipped Orders
- Completed Orders

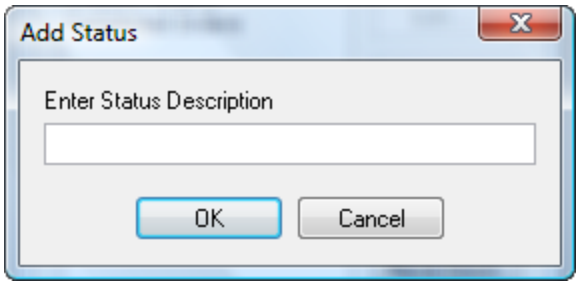
In certain circumstances it may be necessary to additional Order Status.

To Add a New Order Status:

1. Start the **Order Manager**.
2. Select **Tools** → **Maintain Order Status List**. The **Maintain Order Status List** dialog will display.



3. Select the **Add** button. The **Add Status** dialog will display.



4. Enter the name of the **Order Status** to the dialog, then select **OK**.

Related Topics

Order Manager Overview

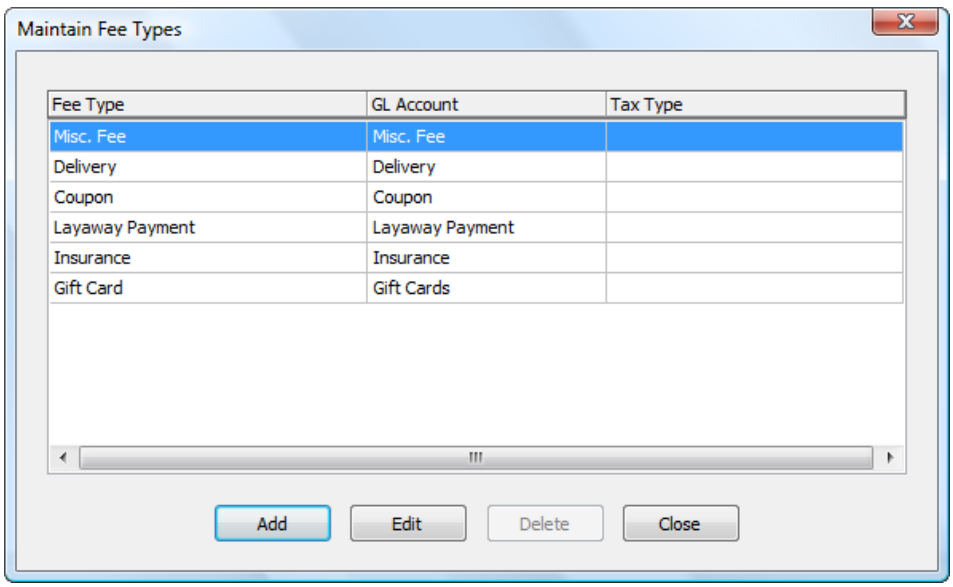
SET UP CUSTOMER FEE TYPES

Order Manager → *Tools* → *Maintain Fee Types*

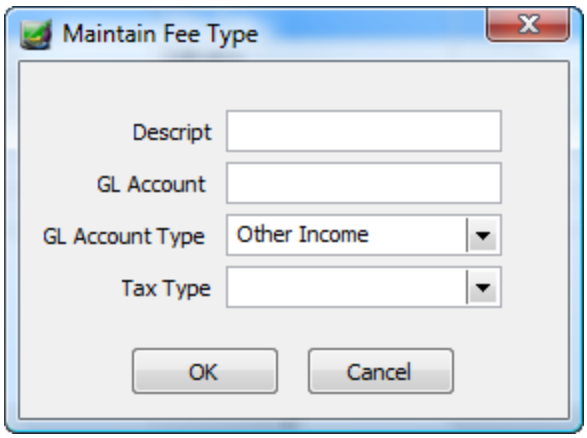
Liberty uses the term **Fee** for fees charged to customers (i.e. buyers or purchasers). Examples of Fees include delivery and insurance fees. Fees can also be created to handle items that are not inventoried, such as candy or inexpensive knick knacks sold at a sales counter.

To Add a Fee Type:

1. From the Order Manager main menu, select **Tools** → **Maintain Fee Types**. The **Maintain Fee Types** dialog will display:



2. Click on the **Add** button. The **Maintain Fee Type** dialog will display:



3. Enter a name for the Fee Type in the **Descript(ion)** field.
4. If you are using accounting software with Liberty, enter the appropriate General Ledger (GL) account number in the **G/L Account** field.
5. In the **G/L Account Type** field, select either **Income** or **Other Income** from the drop-down menu. What you choose is dependent upon the way your accounting software is setup.
6. Select a Tax Type for the Fee from the **Tax Type** drop down list.
7. Click on the **OK** button.

Related Topic

Set Up Transaction Types

QuickBooks Link Module

SET UP AUCTION PAYMENT TYPES

Order Manager → *Tools* → *Maintain Payment Types*

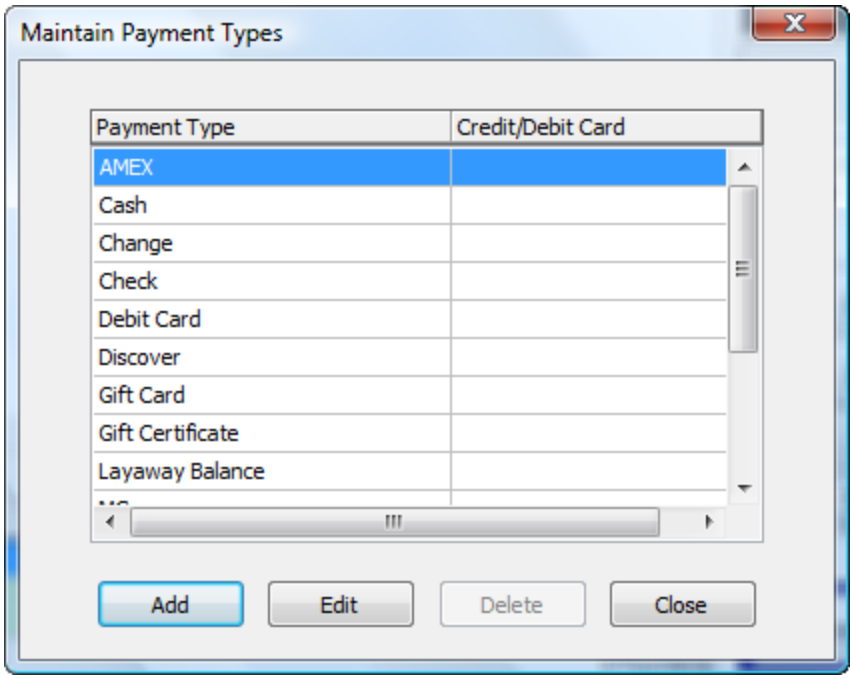
Payment Types provided with Liberty include Cash, Check, Visa, Master Card, American Express, Discover, Store Credit, Web Sale and Gift Certificate. Use this procedure to create additional Payment Types for use by your store.

Copyright 2010, Resaleworld.com, Inc.

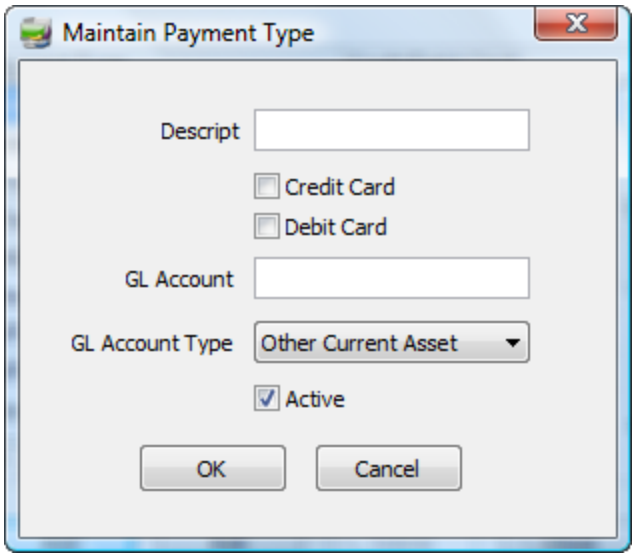
***Note**: Do not add **Coupon** as a Payment Type. For tax purposes, Coupons represent a deduction from a sale, not a Payment Type.*

To Add or Edit a Payment Type:

1. From the main menu of Liberty Point of Sale click on **Setup** ➔ **Maintain Payment Types**.



2. Click on the **Add** button to add a new Payment Type, or the **Edit** button to make changes to an existing Payment Type.



3. Enter a label for the payment type in the **Description** field. This label will appear on the

button created for this Payment Type on the PoS screen (see below).

4. If the Payment Type is a credit card, select the **Credit Card** check box.
5. If you are using accounting software such as QuickBooks and linking it with Liberty (skip this step if you are not):
    a. Enter the appropriate account number in the **GL Account** field, and
    b. Select a **GL Account Type** from the drop-down.
6. Click on the **Save** button.

    Once a payment type is added, a button is automatically created on the Point of Sale screen for that payment type. The button is added to the right side of the screen where the other payment type buttons are already located. Note that PoS must be restarted before the button(s) will appear. Note also that once a Payment Type has been used in a transaction it cannot be deleted.

To Delete A Payment Type:

Note: *Once a payment type has been used, it cannot be deleted.*

1. From the main menu of Liberty Point of Sale click on **Setup** ➔ **Maintain Payment Types**.
2. Click on the **Delete** button.
3. Click **OK**.

Note*: Cash, Check, Visa, Master Card, American Express, Discover, Store Credit, and Gift Certificate are System Records and cannot be deleted.*

Related Topics

Set Up Payment Types

Liberty Point of Sale Overview

Copyright 2010, Resaleworld.com, Inc.

SET UP AUCTION PAYMENT MAPPINGS

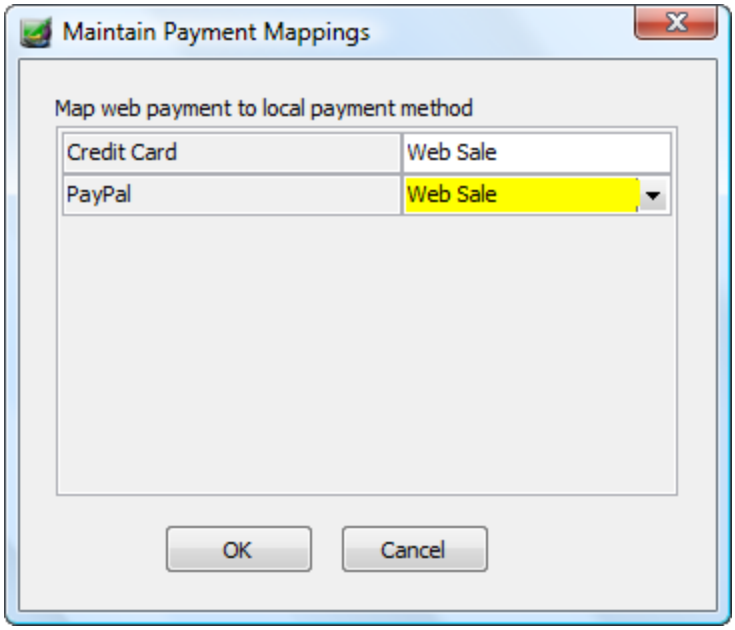
Order Manager → *Tools* → *Maintain Payment Mappings*

Whenever an item sells, the customer pays for the item and the method of payment is recorded as a Payment Type. Examples of Payment Types are Visa, Master Card, Cash, Check, etc.

Web Sale is the Payment Type that Liberty defaults to for all online sales. It may, however, be preferable to map (assign) online methods of payment (eBay Payments credit, PayPal, etc.) to a Payment Type other than Web Sale. Using the QuickBooks Link is an example of when this step should be taken, as different Payment Types may be assigned to different GL Account numbers within the accounting software. Assigning a web payment to the appropriate Payment Type within Liberty will ensure information exported from Liberty into the accounting software will ultimately contain the information necessary to enable full utilization of the accounting software's capabilities.

To Setup Auction Payment Mappings:

1. Start the **Order Manager**.
2. Select **Tools** → **Maintain Payment Mappings**. The **Maintain Payment Mappings** dialog will display:



3. Locate the Web Payment Type to be changed in the left column, then select the

appropriate **Local Payment Method** (within Liberty) from the drop-down provided in the right column.

4. Select **OK** when finished.

Related Topics

Set Up Auction Payment Types

Tutorial

Copyright 2010, Resaleworld.com, Inc.

INTRODUCTION

This Tutorial is a step-by-step introductory guide to using this program. We like to say that it covers the 10% of the program that you will use 90% of the time. As such it is not exhaustive in detailing the use of Liberty. Additional details will be found in other sections of the Help file and manual.

The Tutorial provides instruction in the following areas:

1. Creating client accounts,
2. Entering item information,
3. Printing price tags and item lists,
4. Posting sold items, and
5. Paying clients.

We recommend that all new users of the program take the time to go through the Tutorial step by step. We also strongly recommend using Training Mode while learning the program.

> *(Editor's Note: for simplicity both Liberty for Consignment (aka L4C) and Liberty for Trading Assistants (L4TA) are referred to simply as **Liberty** in their respective manuals and online help files. Liberty for Consignment is designed for selling items in the store only: it does not contain the necessary functions to list and sell items online. To sell items online, please contact Resaleworld to purchase Liberty for Trading Assistants.)*

Related Topics

Training Mode

Starting the Liberty Programs

Copyright 2010, Resaleworld.com, Inc.

TRAINING MODE

Inventory Module → *File* → *Training Mode*

To assist you as you learn how to use Liberty there is a practice area for you to, so to speak, play in. We refer to this capability as **Training Mode**.

Information entered into Liberty while you are in Training Mode is stored in a totally separate database. Since this Training database is totally separate from your **real** database information entered while in Training Mode has no effect on your real information.

To see whether or not you are in Training Mode, look at the very top of the Liberty program, above the Main Menu (which says File, Activities, Reports, Tools, Window, Help). If you see the words **Inventory Module Training Mode**, then you are in Training Mode. If you see just **Inventory Module**, then you are **not** in Training Mode.

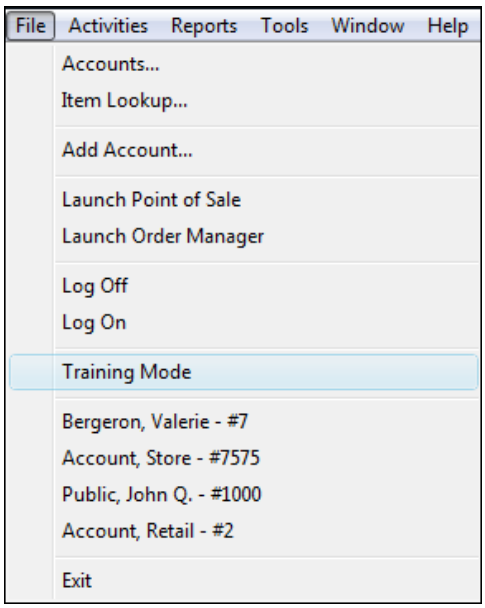
You will also know you are in Training Mode when the phrase *Training Mode* is blinking on a yellow background at the very bottom of the screen.

> ***Note:*** *A maximum of 50 auctions may be uploaded under Training Mode.*

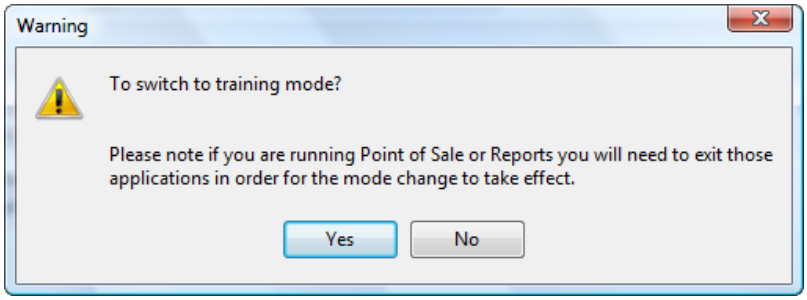
To Switch From Real to Training Mode:

1. If they are currently running, shut down the Order Manager, Point of Sale, Reports, and/or the Category Editor.
2. Select **File** from the Main Menu, then **Training Mode**.

Copyright 2010, Resaleworld.com, Inc.



3. The following dialog will display:


Warning
To switch to training mode?
Please note if you are running Point of Sale or Reports you will need to exit those applications in order for the mode change to take effect.
Yes
No

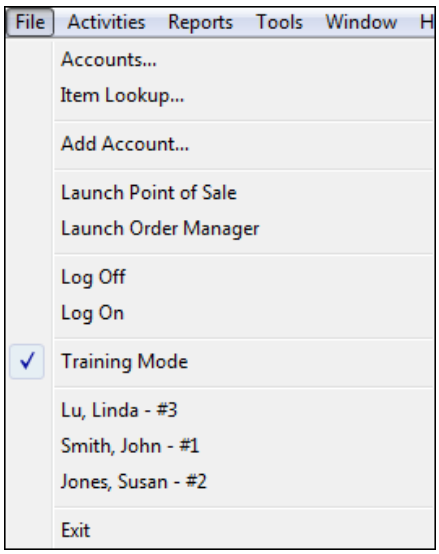
Click **Yes**. The Inventory Module will shut down.

4. Start Liberty again. Once you have entered the User ID and Password (using RWD in both fields will get you into the program), you will be in **Training Mode**.

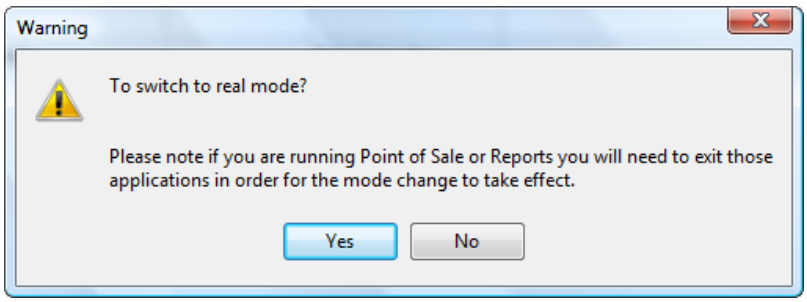
To Switch From Training Mode To Real Mode:

1. If they are currently running, shut down the Order Manager, Point of Sale, Reports, and/or the Category Editor.
2. Select **File** from the Main Menu, then **Training Mode**. (Note the check mark next to Training Mode, indicating you are currently in Training Mode.)

Copyright 2010, Resaleworld.com, Inc.



3. The following dialog will display:


Warning
To switch to real mode?
Please note if you are running Point of Sale or Reports you will need to exit those applications in order for the mode change to take effect.
Yes
No

   Click **Yes**. The Liberty program will shut down.

4. Start Liberty again. Once you have entered the User ID and Password you will be in **Real Mode**.

AN IMPORTANT TERM TO KNOW: DEFAULT

Computers have brought a lot of new words and new definitions of old words into the English language. Unfortunately many of them are cryptic, especially ones based on acronyms like **RAM** , which stands for Random Access Memory.

Copyright 2010, Resaleworld.com, Inc.

One of the beauties of the English language though is its flexibility and adaptability. Which brings us to our favorite computer term, and one we would like you to remember:

Default

The definition of **Default** is:

An assumption the computer makes unless given instructions to the contrary.

Why is this important? Because it saves a LOT of time when the defaults are set properly in a computer program. For instance, if most of your clients are paid by check, why select **check** every time you pay a client when setting the Default Payment Type to **check** will make the system do it for you automatically?

As you go through this Tutorial, as well as the Manual and Online Help, you will see a lot of attention paid to defaults, because properly setting defaults will make learning and using Liberty much easier for new users and much faster for all users.

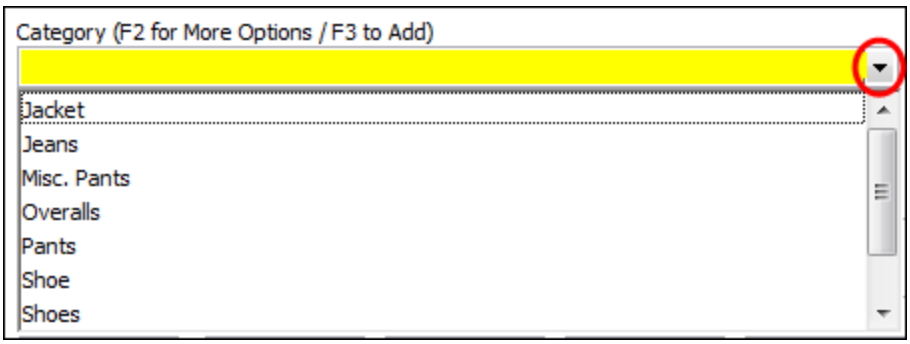
Related Topics:

Set up Checklists

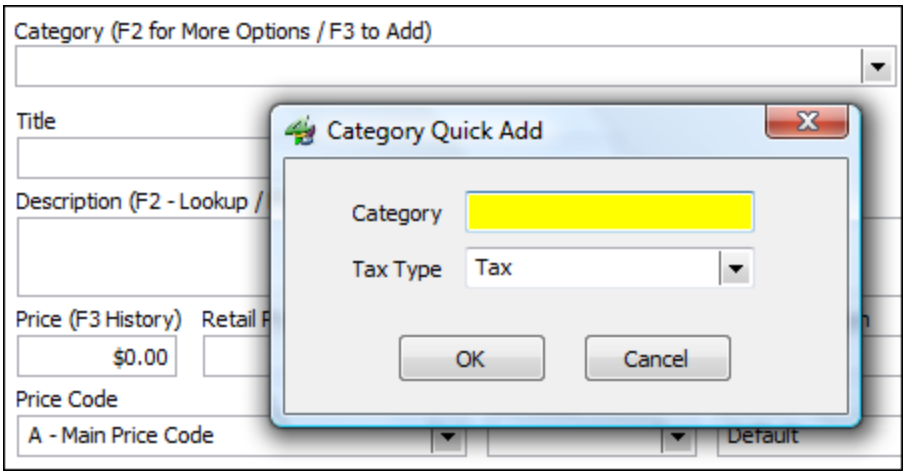
USING DROP-DOWNS AND POPUP WINDOWS

To make using Liberty faster and more convenient, **Drop-downs and Popup Windows** are utilized in many areas of the program. Drop-downs are characterized by a field with a downward pointing triangle at the right edge of the field, such as the one circled in the example below:

Copyright 2010, Resaleworld.com, Inc.



Pop-up windows are characterized by on screen hints, such as pressing **F3** in the **Category** field in the example below:



Following is a list of some of the fields containing a drop-down or popup window in areas covered by this Tutorial. There are other fields in addition to those listed below which use drop-downs and pop-ups as well.

Account Display Screen

- **Automatic Popup**: City and Zip Code (Accompanied by State). Note that this popup automatically displays whenever a new City or Zip is added.
- **Drop-downs**: Address, Phone, Email, and Account Type.

Item Entry Screen:

- **Pop-ups**: Category, Brand, and Description. Note that each requires pressing a function key to cause the popup to display.
- **Drop-downs**: Purchase Method, Date Received, Category, Brand, Price Code, Store Section, Tax Code, Website.

Copyright 2010, Resaleworld.com, Inc.

When you first receive your software, some of the drop-downs and pop-ups are populated with information as part of the initial set up procedure, whereas others have few or no choices will appear in some of the drop-downs and pop-ups.

An example of a field that is already populated is the Price Code field. Note, however, that Price Codes still require setting up prior to using the software. See the section entitled Set up Checklists for more information and a list of field's requiring set up prior to using Liberty.

An example of a field that is left blank is the City/State/Zip popup used when entering account information. These fields are left blank so that you may enter just those that are appropriate for your geographic locale.

Related Topics

Set up Checklists

A Note About Consistency

CREATING NEW AND MAINTAINING EXISTING ACCOUNTS

For each person or business that provides merchandise to the store you need to create an account. Once the account is created you may begin adding inventory to that account. If you also like to keep records of consumers (people or companies who purchase items), add them as an account as well.

The **Account Type** field in the Account Detail window designates accounts in one of three ways:

1. **Client.** Use to create accounts for clients who:
    a. Consign merchandise,
    b. From whom merchandise is purchased outright, and
    c. Are consumers (i.e. customers or buyers).

Copyright 2010, Resaleworld.com, Inc.

> ***Note:*** *Client accounts containing no inventory are considered to be customer accounts.*

2. **Retail Vendor.** Use to create an account for businesses from which merchandise is purchased for retail sales.
3. **Store Account.** Use to create accounts for merchandise purchased by the store, such as from liquidators, garage sales, owners' and/or employees' personal belongings, etc.

> ***Tip:*** *When working with accounts, press the <Alt> key and the number preceding the name of the tab. For instance, press <Alt> <1> for the Account tab, <Alt> <2> for the Inventory tab, etc.*

Related Topics

Add a New Client Account

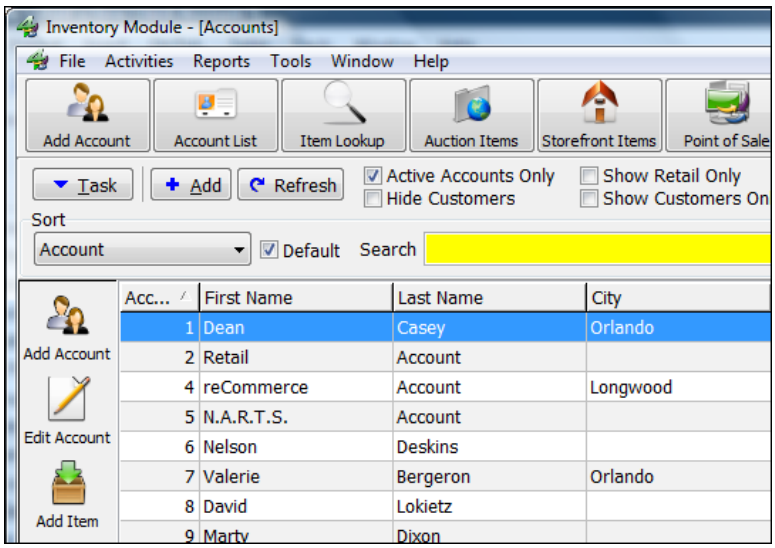
ADD A NEW CLIENT ACCOUNT

Inventory Module ➔ Task ➔ Add Account

You must create accounts for clients or businesses that provide goods for sale in your store. Once you have created a client account, you may add inventory received from that client into Liberty. You may also create accounts for customers -- those who purchase items from you. The primary reason for doing so is to allow you the tracking of customer purchases for marketing purposes..

Create an Account:

1. There are a number of ways to create a new account. From the Inventory Module do any one of the following five methods:
    a. Click on the **Add Account** button at the top of the screen (located just under the Main Menu);:



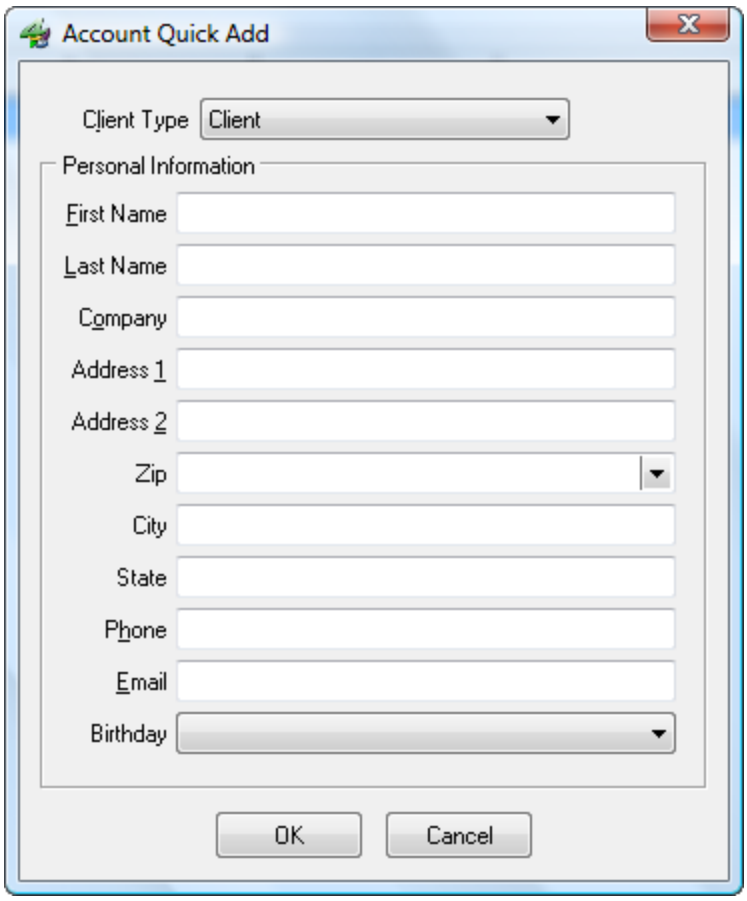
b. Click on the **Add Account** button on the left side of the screen (just under the Task button);

c. Select **File** from the **Main Menu** (the menu at the top of the screen that says File, Activities, Reports, Tools, Window, Help), then select **Add Account**;

d. While on the **Account Detail window** click on the **Add** button, or

e. Select **Task** ➔ **Add Account**.

2. Upon performing one of the previous five actions, the **Account Quick Add** dialog will display:



Select the type of account this is from the **Client Type** drop-down box. There are three types of accounts to from which to choose:

- **Client:** for consignors and customers.
- **Retail Vendor**: use to create an account for business that merchandise is purchased from for retail sales.
- **Store Account.** Use to create accounts for merchandise purchased by the store, such as from liquidators, garage sales, owners' and/or employees' personal belongings, etc.

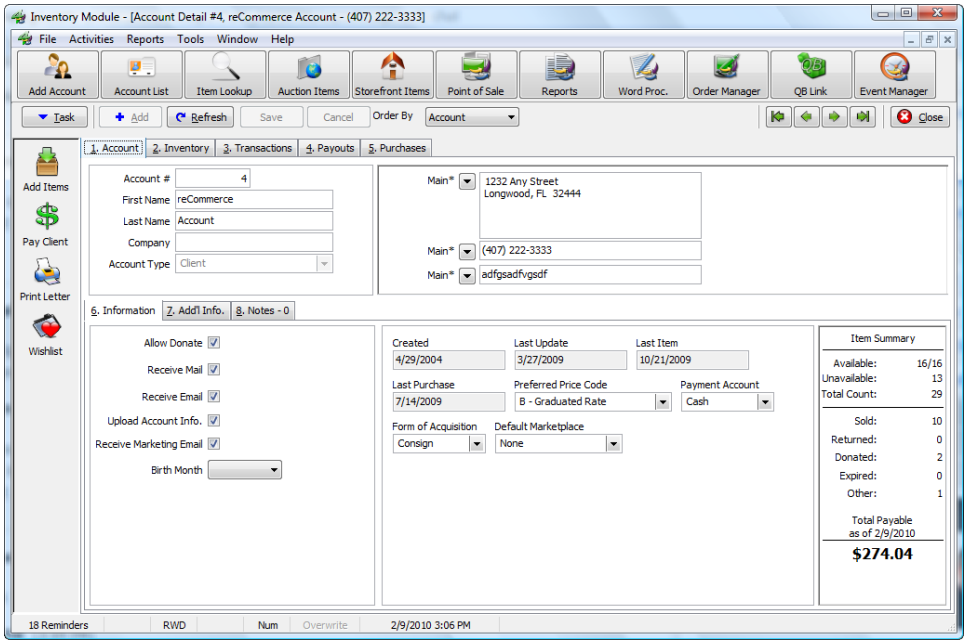
Note: *Once the account is saved, the Client Type cannot be changed.*

3. Fill in the remaining fields for this account (first name, last name, address, etc.).

Note: *If the zip code you enter is new, the New Zip Entry dialog box opens. Once you enter the zip code, city and state information, Liberty remembers this information and will fill in the City and State field for you automatically each time you add a new account.*

4. When finished click on the **OK** button. The **Account Detail** window will now display:

Copyright 2010, Resaleworld.com, Inc.



Notice that the account number is automatically assigned. The number used is based on the contents of the Next New Account # field (located under **Tools** → **Options** → **Account**). You may change the account number at this point if you wish, however, **do not change the account number once inventory has been added to an account**.

5. In the lower half of the screen you will see three additional tabs, with the **6. Information** tab contents displayed. Select the appropriate choices from the drop-downs based on the following information:

    a. **Payment Account**. Select the default payment method for this account (cash or check).

    b. **Default Marketplace**. Select the default Marketplace to which this account's items will be posted. Generally this will be eBay.

    c. **Default Auction User**. Since it is possible to have multiple eBay accounts, a default auction account may be specified.

    d. **Form of Acquisition**. There are two choices:

        i. **Consign** - which is chosen when items are consigned (the client is paid only if and when an item sells); and

        ii. **Purchased** - which is selected when the client is paid for the item immediately, rather than waiting for the item to sell.

6. Add more information at your discretion about the account, such as additional addresses, phone numbers, and email addresses, etc.

7. When finished, click the **Save** button.

Related Topics

Edit Account Information

Enter Additional Addresses, Phone Numbers, and E-Mail Addresses

Enter Additional Account Information

Add One of a Kind Items

Add Retail Items

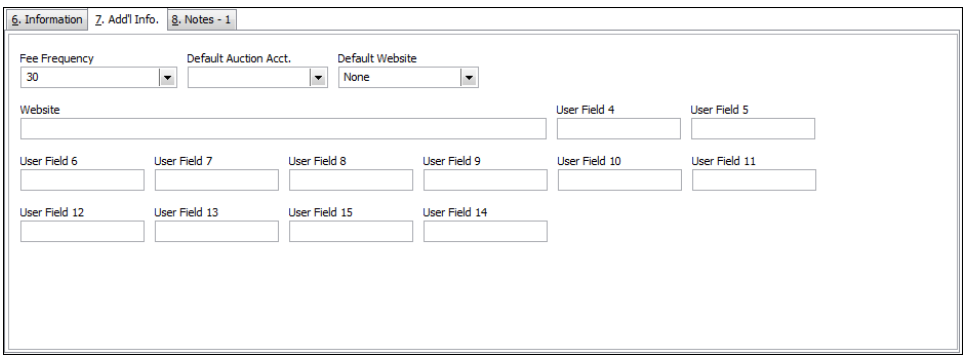
ADDITIONAL (CLIENT) INFORMATION

Inventory Module ➔ *7. Add'l Info Tab*

The **7. Add'l Info** tab in the Account Detail window displays information specific to the account. Note that default settings can be set for many of the fields. See below for more details on the various default settings.

Fields contained within the **7. Add'l Info** tab may be moved to appear on the **6. Information** tab. For details on moving fields between these two tabs, please see the section entitled Customize the Account Detail Window.

Following is a description of all of the fields contained in both the **6. Information** and **7. Add'l Info** tabs.



Additional Info Tab Fields

Payment Account

Clients may be paid with either a check or in cash. Use this field to select the default payment method for this account.

To specify the default **Payment Method** for all new accounts, go to **Tools** → **Options** → **Accounts** and select the appropriate option in the Payment Code field's drop-down.

To change the default Payment Account for multiple accounts simultaneously, see the section entitled Change Payment Account for Multiple Accounts Simultaneously.

Default Marketplace

(Field only used when selling items online.)

This field is used to designate the default Marketplace. Under most circumstances the default Marketplace will be eBay. To set up multiple marketplaces, refer to the section entitled Set Ecommerce Marketplace Options (under **Tools** → **Ecommerce Options** → **Marketplace**).

> ***Important Note**: Do **not** enter a **Default Marketplace** unless an item is being sold online. Liberty reads the contents of the **Marketplace** field to determine if an item is being sold online or offline. All items sold online require auction information be entered before reaching a status of **Available**.*

Any item entered with a **Marketplace** specified in the **Marketplace** field will have a status of **Needs Info** until all required **Auction Info** (shipping parameters, duration, reserve, photos, etc.) is entered. Entering this information is unnecessary, will require additional time, and as long as an item has a status of **Needs Info** it cannot be sold.

Default Auction User

(Field only used when selling items online.)

This field is used to designate the default eBay auction account.

When posting client items to eBay, it is sometimes preferable to have multiple auction accounts. For instance, you might have two different auction accounts, one devoted to Beanie Babies, the other to everything else.

If a client were to bring in a Beanie Baby and a stereo, using the Auction Account field lets you select which account to post the item to on eBay.

Copyright 2010, Resaleworld.com, Inc.

To create Auction Users, please see the section entitled Ecommerce Brokers Set Up.

Form of Acquisition There are two ways to acquire items:

1. **Consign**, which is chosen when items are consigned (the client is paid only if and when an item sells); and
2. **Purchased**, which is selected when the client is paid on the spot for the item.

Select the default method for how items are normally accepted for this account.

Bad Checks If you receive a bad check from a customer, placing a check in this field will cause an alert to appear if the same customer tries to pay for items with a check in a subsequent purchase.

Receive Mail When this check box contains a check mark, the client will be included in all mailings that use Mailing Labels printed using Liberty Reports.
Removing the check mark instructs Liberty to not print a mailing label for this client.

Receive Emails A check in this field's checkbox indicates the client will receive emails generated by Liberty. Unchecking this box will prevent the client from receiving emails. For more information on emailing clients, see the section entitled Sending Automated Emails with the Event Manager.

Receive Marketing Emails A check in this field's checkbox indicates the client will receive emails generated by Liberty. Unchecking this box will prevent the client from receiving emails. For more information on emailing clients, see the section entitled Sending Automated Emails with the Event Manager.

Allow Donate Check this box if items from this account can be donated when the consignment period ends. Uncheck this box if items from this account should not be donated - this will prevent items from being posted as donated.

> ***Note:*** *Each item has its own Allow Donate check box. There is also a Global Allow Donate setting.*

Email Balances Check this box to enable account balances to be emailed to this client. For more information on emailing clients, see the section entitled Sending Automated Emails with the Event Manager.

Copyright 2010, Resaleworld.com, Inc.

Email Transactions	Check this box to enable transactions to be emailed to this client. For more information on emailing clients, see the section entitled Sending Automated Emails with the Event Manager.
Preferred Price Code	Select the default price code for this account.
Filter Code	Select the filter code for this account. You can use this field to group accounts in a way you find useful. For example, some stores create a filter code called *VIP* and assign that to their premium accounts. Filter Codes must be added from the Filter Code Maintenance window before they can be used in an account. See Define Filter Codes for more information.
Rating	Use this field to distinguish your top-level accounts from mid-range accounts, etc. by assigning all accounts a priority rating.
Created	The date the account was created. This field cannot be changed by the user.
Fee Frequency	Use this field to establish how often the cycle of automatic bill will occur if you charge your clients a regular or periodic fee.
Last Purchase	Displays the last date a purchase was made by this account. This is recorded if you select the account prior to posting the sale in Liberty Point of Sale.
Last Update	Displays the last time any changes were made to any area of the account, from account set up to items, to payouts.
Next Item Number	Use this field to change the next item number in this account. Since you are not likely to run out of item numbers, there is really no reason to change the next item number field. If you change the item number to a number already in use, Liberty will automatically skip to the next available item number.
Last Fee	Displays the last time a fee was applied to this account.
Last Item	This field indicates the last date an item was added to this account.
Inactive Date	Displays the date an account was marked as deactivated. Deactivating an account is accomplished by looking up the account, then selecting **Task** → **Maintenance** → **Deactivate Account**. Accounts may be reactivated in the same manner.
Website	Use this field to enter the client's or vendor's Website address.

Copyright 2010, Resaleworld.com, Inc.

User Field 1	User Fields may be used to store any information you wish. The difference between User Field 1 and User Fields 2-15 is that unlike 2-15, User Field 1 can be printed on price tags, and can be used to lookup accounts.
User Fields 2-15	User Fields may be used to store any information you wish. . For example, you could create a fields to store the account holder's birthday, spouse's name, credit card number, etc. In addition to providing useful information on screen, reports can be generated based on information contained in these fields. All User Fields may be renamed and resized. Please see the section entitled Customize the Account Detail Window for more information.

Related Topics

Customize the Account Detail Window

Define filter codes

Set up fee frequencies

CHANGING (EDITING) ACCOUNT INFORMATION

Inventory Module ➔ *Account Display*

The procedure for changing account information depends on the information being changed. Following are two separate procedures:

1. Changing an Account's Name and Company Information, and
2. Changing an Account's Address, Phone, and Email Information.

Warning: Do not change the Account # - doing so may lead to adverse effects. For instance, items may post to the wrong account or not at all.

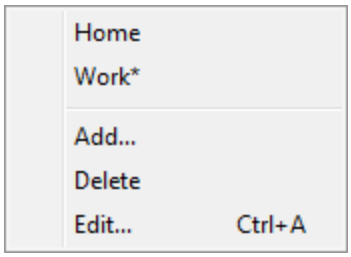
To Change an Account's Name or Company Information

1. Lookup the client account which you wish to make changes to.
2. Click in the field you wish to change and make the necessary changes.
3. Click on the **Save** button for changes made to any fields other than the address, phone and e-mail sections.

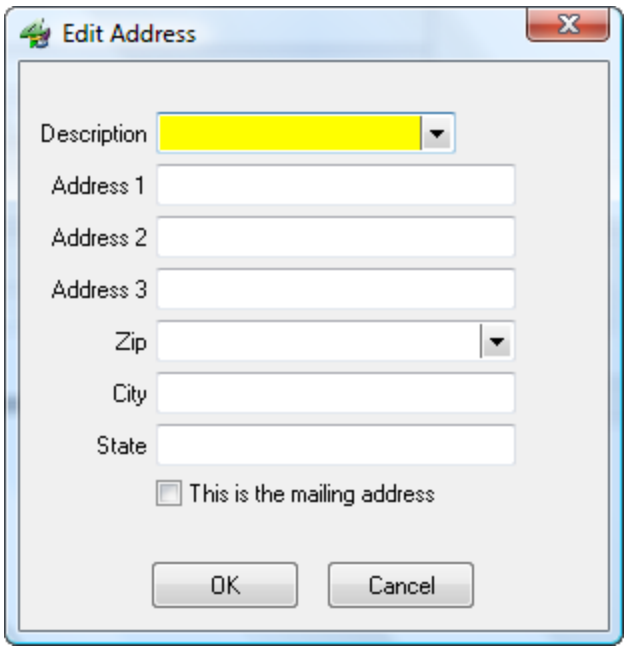
***Note:** The **Account Type** can only be changed before any items have been added to the account. Once the first item has been added to an account it is no longer possible to change the Account Type. If you have a client who has, for instance, both consigned and retail items, it will be necessary to create two accounts for the client, one of each type.*

To Change Address, Phone, or Email Information

1. Lookup the client account to which you wish to make changes.
2. Immediately to the left of the Address, Phone, and Email information displayed on screen is a button with a downward pointing blue triangle. Click on this button, and a menu such as the following will display:



3. Select **Edit**. A dialog such as the following will display:



4. Select the Address, Phone, or Email to be changed by clicking on the appropriate choice in the **Description** field.
5. Make changes as necessary.
6. Click on the **OK** button.

Related Topics

Add additional addresses and phone numbers

Additional Info

DELETING A CLIENT ACCOUNT

To maintain data integrity, it is not possible to delete client accounts. Accounts may, however, be deactivated. When an account is deactivated it will not appear in the **Account List** and cannot be looked up using any search criteria other than the Jump buttons.

To Deactivate an Account

1. **Lookup** the Client account.
2. Select **Task** → **Maintenance** → **De-Activate Account**.

A second option is to remove the check from the **Receive Mailings** check box will ensure a client does not receive any mailings.

To Remove a Client from the Mailing List

1. **Lookup** the Client account.
2. Click on the **7. Add'l Info** tab.
3. Click on the **Receive Mail** check box so that no check appears.
4. Click on the **Save** button.

PRINTING

The ability to print price tags and item lists for clients is perhaps the single, most beneficial benefit to using Liberty. Before printing, however, it is necessary to first have the Liberty and the printers communicating properly.

Instructions on accomplishing this task are contained in the section entitled Select Printers & Printing Defaults and the **Installation and Setup Guide**, which is a separate document provided with the software. You must complete these tasks before printing will be successful.

PRINTING AN INVENTORY LIST (ITEM LIST)

Inventory Module → *Task* → *Print* → *Print Item List*

An Item List is a report printed for a client that contains a list of some or all of the items the client is consigning or selling to the store. There are three different Item Lists to choose from:

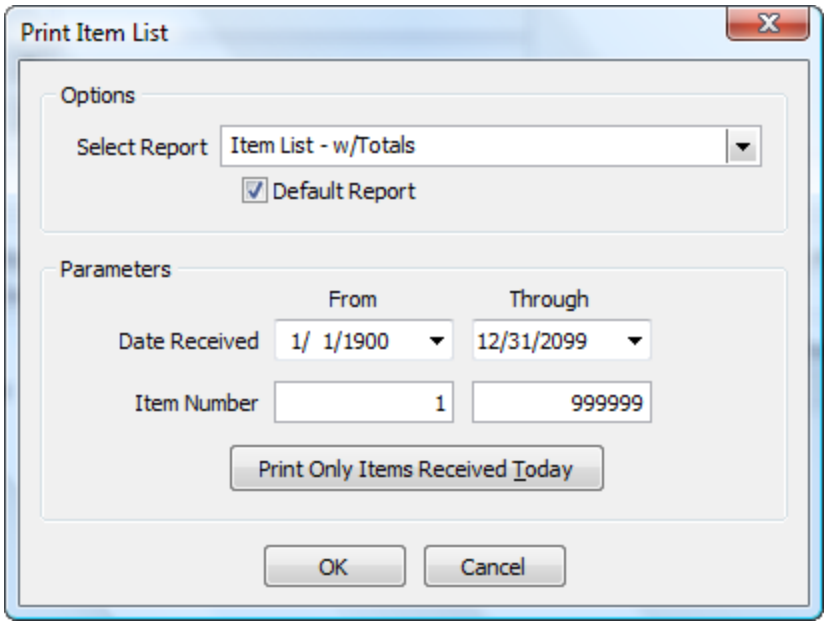
1. Item List with Totals
2. Item List with Sales Recap
3. Auction Drop Off List

When printing an Item List, you may choose to print all items, a range of items based on the item numbers, a range of items based on their date received, etc.

To Print an Item List

1. Lookup the account you wish to print an item list for.
2. Select **Tasks** → **Print** → **Print Item List,** or

   Select the **2. Inventory** tab, then click on the **Price Tags** button on the left side of the screen. The **Print Item List** dialog will display:



3. Select the type of report to print from the **Select Report** drop-down. If you are not sure which report to print, when you reach step seven choose **Preview**. This allows you to see the contents and layout of the report selected before printing.

4. The **Date Received** fields (**From** and **Through**) refer to the date the items were received into inventory. Items are not included in the list with a date that falls outside the range entered.

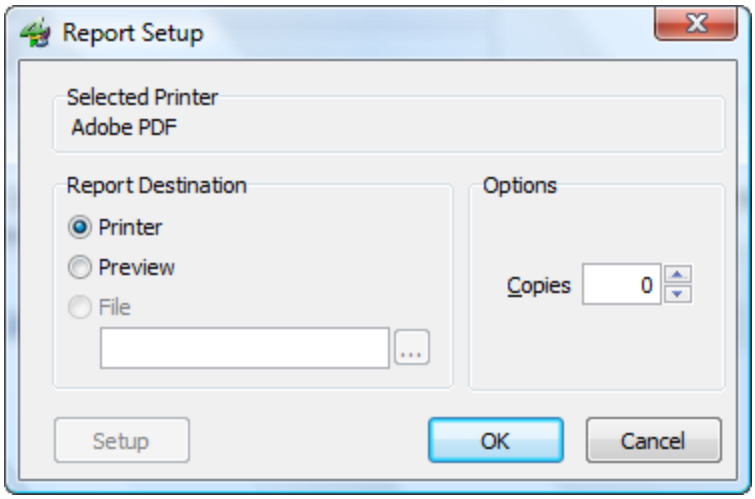
   When you are printing a list of those items received only today, clicking the **Print Only Items Received Today** button will save you the effort of typing in today's date in both the From and Through fields.

   > ***Tip***: *You will probably find using the method of specifying the Date Received range, as opposed to specifying the first and last item number to print the list for, to be the easiest method for setting the range of items to print.*

   When using the Date Received fields enter the dates in MM/DD/YYYY format, using the full 4 digit year, as in 2006, not 06. An alternative to using the keyboard is to click on the drop-down and select the dates from the calendar that appears.

5. The **Item Number** fields (**From** and **Through**) are used to specify which item numbers to include in the list. Items falling outside the range entered will not be included.

6. Select **OK** to print the list. The **Report Setup** dialog will display:



7. Select the **Print** button to immediately print the Item List, or select the **Preview** button to view the Item List on screen. Note that you may specify multiple copies of the list be printed using the **Copies** field.

> ***Tip**: At the conclusion of entering items, stay in the Item Entry screen (don't click the Close button). By selecting **Tasks** → **Print Item List** while still in the Item Entry screen, Liberty will remember the item number you started with so you don't have to enter it.*

Related Topics

Select Printers & Printing Defaults

PRINTING PRICE TAGS

Inventory Module → Task → Print Price Tags

Liberty prints a wide variety of price tags and price labels. To order price tags and price labels please contact Resaleworld. To view some of the price tag and label formats available, please see the section entitled Price Tag and Label Formats.

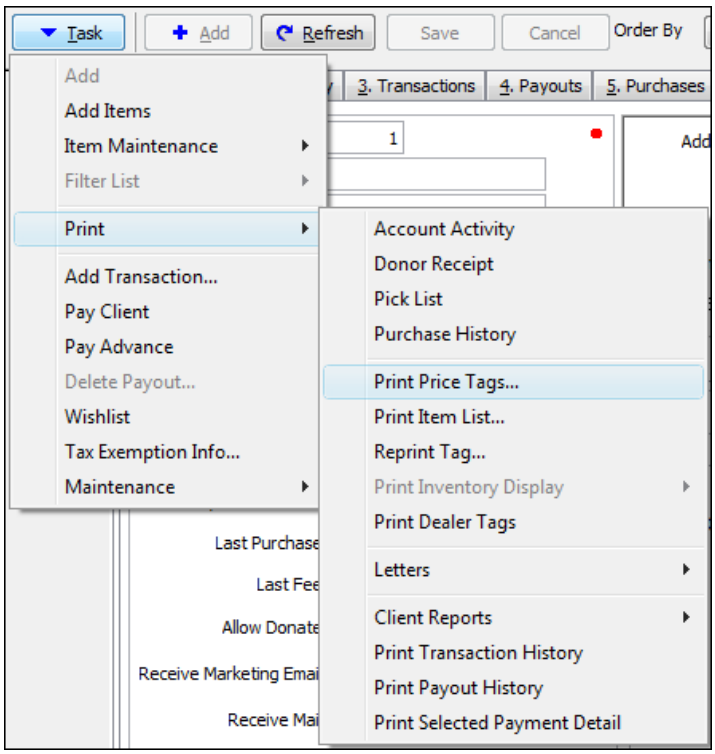
When printing tags and labels for one account, you may elect to print one price tag, all price tags for items entered today, price tags for a certain range of item numbers, etc. You may alternatively choose to print tags in a batch all at once using the Bulk Tag Printing routine.

Before you begin printing price tags, make sure the desired price tags are installed in the tag printer and the tag printer is turned on. If using colored tags print on the side of the price tag that is white or mostly white. Do not print on the side that has full color. Printing on the color side of the tag may be difficult to read and bar code readers may not be able to read the bar code.

To Print Price Tags for an Account:

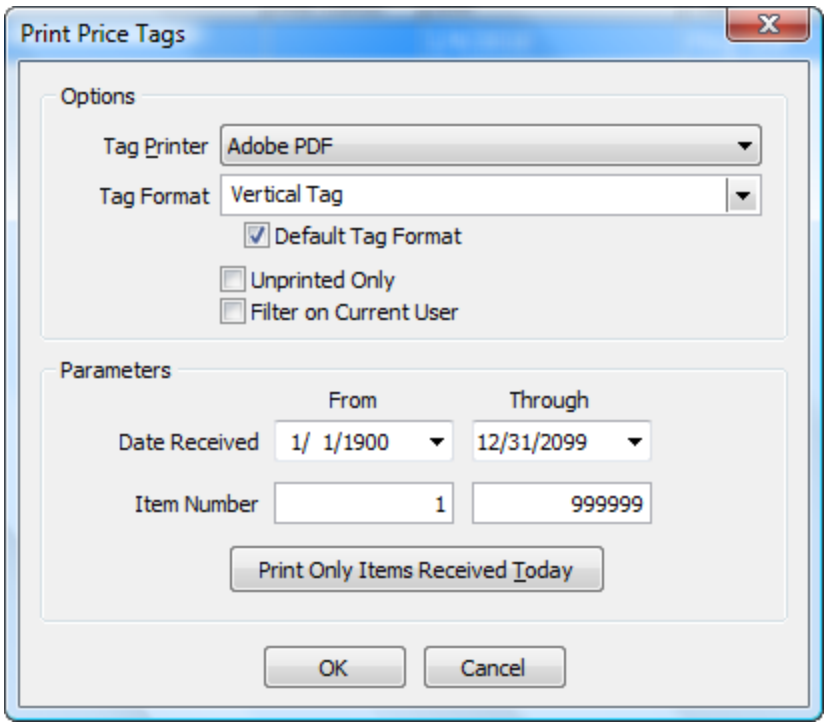
1. Lookup the account you wish to print tags for.
2. Select **Tasks → Print → Print Price Tags,** or

Copyright 2010, Resaleworld.com, Inc.



Select the **2. Inventory** tab, then click on the **Price Tags** button on the left side of the screen.

The **Print Price Tags** dialog will display.



3. The **Tag Format** drop-down allows you to choose the style of tag you wish to print. Note that the choices in the drop-down are listed in the format (***Printer – Tag Format***). For example, choosing **Orion/2433– Regular** selects the **Regular** format tag to print on the **Zebra** (formerly Eltron printer known as Model 2433 (or alternatively as the Orion printer).

   Since there are many Tag Format choices, and you will likely print the same tag format on the same printer 99% of the time, the **Default Tag Format** check box allows you designate which printer and tag format will be the default. Selecting a default tag format will speed up the process of printing tags, because it eliminate the need to select a Tag Format every time you print tags.

4. Click on the **Unprinted Only** check box to print tags only for items that have not had a tag printed before.

5. Ignore the **Filter on Current User** check box. It is only used in specialized situations. For more information, see the section entitled Print Price Tags and Price Labels.

6. The **Date Received** fields (**From** and **Through**) refer to the date the items were received into inventory. Tags will not be printed for items with a date falling outside the range entered.

   When you are printing tags only for items received today, clicking on the **Print Only Items Received Today** button will save you the effort of typing in today's date in both the From and Through fields.

Copyright 2010, Resaleworld.com, Inc.

> ***Tip**: You will probably find using the method of specifying the Date Received range, as opposed to specifying the first and last item number to print tags for, to be the easiest method for setting the range of tags to print.*

When using the Date Received fields enter the dates in MM/DD/YYYY format, using the full four digit year, as in 2009, not 09. An alternative to using the keyboard is to click on the drop-down and select the dates from the calendar that appears.

7. The **Item Number** fields (**From** and **Through**) are used to specify which item numbers to print tags for. Tags will not be printed for items with a number falling outside the range entered.

> ***Note:** There is no character limit on the From and Through Item Number fields.*

8. Select **OK** to print tags.

> ***Tip**: At the conclusion of entering items, stay in the Item Entry screen (don't click the Close button). By selecting **Tasks** ➔ **Print Price Tags** while still in the Item Entry screen, Liberty will remember the item number you started with so you don't have to enter it.*

Related Topics

Ordering Price Tags from Resaleworld

Select Printers & Printing Defaults

Cancel Tag Printing

Bulk Tag Printing

TRANSACTING SALES

The process of marking items as sold, which includes recording the date of the sale, the actual amount of the sale, and the amount which the consignor, client, or store receives is known as **Posting** the sale. Liberty is designed to handle any situation which might occur when posting sales.

Copyright 2010, Resaleworld.com, Inc.

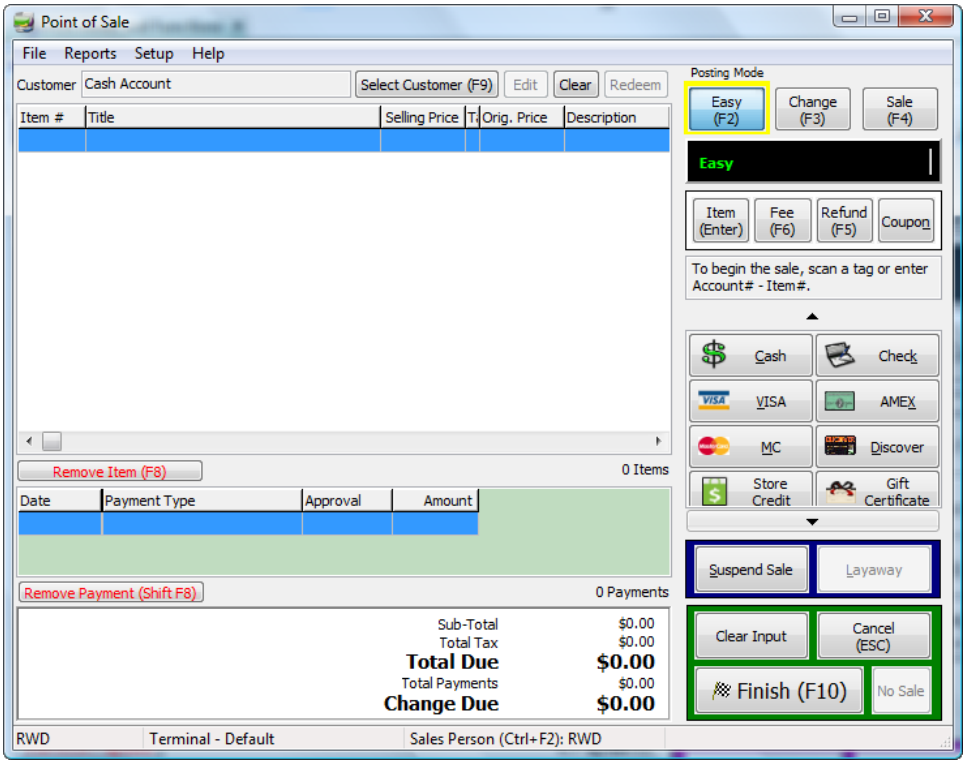
All sales in Liberty are posted using the **Point of Sale Module**.

To Start the Point of Sale Module

Do any of the following:

- Click on the **Point of Sale button**, which is located just under the Main Menu (see below), or
- Select **Start → Programs → Liberty → Liberty PoS Module**.

The **Point of Sale** screen will display:



This tutorial will cover the two most frequently used posting methods:

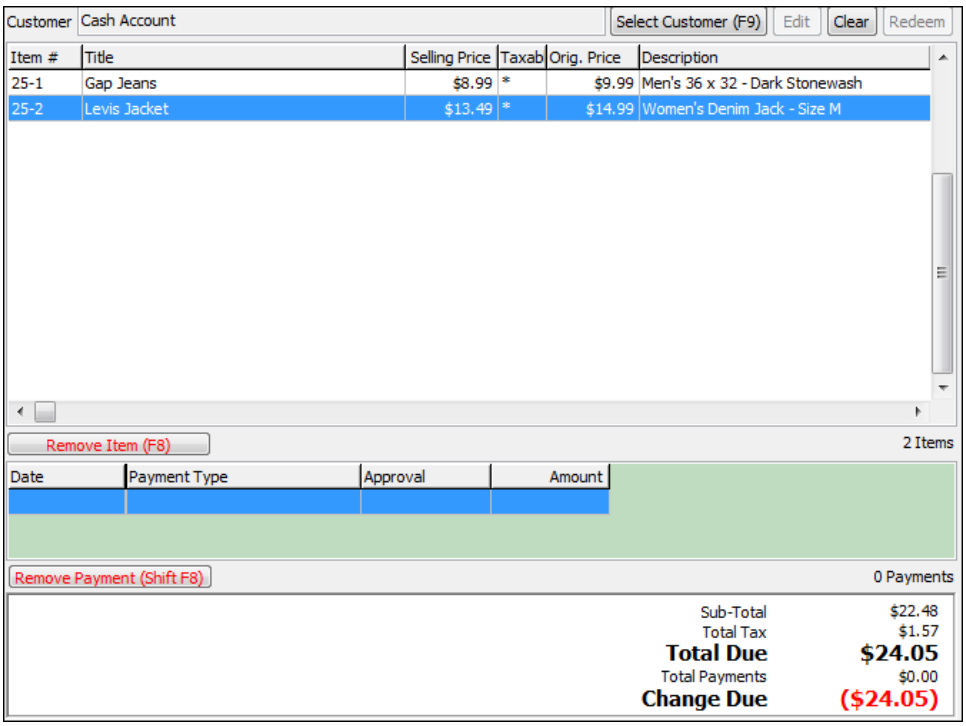
1. **Easy Post**, which is used to post items sold at full price,
2. **Change Post**, which is used to post items at a discounted price, and

For more detailed information about posting sales, please see the sections entitled Point of Sale and Point of Sale Setup.

THE POINT OF SALE SCREEN

The Point of Sale screen may be divided into four parts: the left half, right upper quadrant, lower right quadrant, and the information bar at the bottom of the screen. Following is a brief tour of these four.

The left half of the PoS screen displays items and payments as they are added to a sale. Following is an example:



1. **Item #**. The Account Number and Item Number of the posted item.
2. **Title**. The Title given to the item when it was added into inventory.
3. **Selling Price**. The selling price of the item.
4. **T(axable)**. If the item is taxed, an asterisk (*) will appear in this field.
5. **Orig. Price**. The original price of the item.
6. **Description**. The Description given to the item when it was added into inventory.

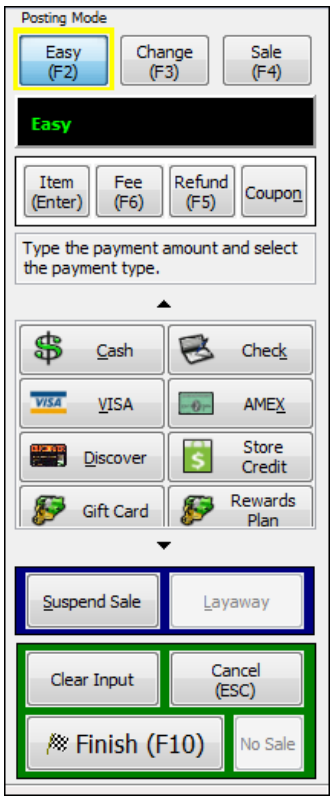
Copyright 2010, Resaleworld.com, Inc.

> ***Note:*** *Columns 1-6 may be reordered by click and dragging the column headers.*

7. **Date**. Date of the sale.
8. **Payment Type**. The type of payment (cash, check, charge, etc.)
9. **Approval**. The approval code for credit card sales.
10. **Amount**. The amount of the payment.

> ***Note:*** *Columns 7-10 may be reordered by click and dragging the column headers.*

The right half of the screen summarizes the sale as it is transacted, and contains the four primary methods for posting items: Easy Post, Change Post, Sale Post, and Refunds. The lower right quadrant of the screen contains the **keyboard input display** (at the top in green letters on a black background), the number pad for touch screen terminals, and additional options for posting sales.



1. **Item.** Used to return to entering items for sale. For instance, if you were to accidentally click on the Fee button and wished not to enter a fee but instead sell more items, clicking on Item would stop the Fee process and take you back to being able to enter more items.
2. **Fee**. Clicking on the Fee button (or pressing <F6>) allows miscellaneous fees (e.g.

delivery fees, pickup fees, etc.) and/or non-inventory items to be entered.

3. **Refund**. Select when refunding money to a customer. Be sure to use a minus (-) sign before the amount when entering the refund.
4. **Coupon**. Selected when a **Coupon** is used to reduce the overall purchase price.
5. **Cash**. Selected when payment is made with **Cash**.
6. **Check**. Selected when payment is made by **Check**.
7. **Visa/Amex/MC/Discover.** Selected when payment is made by Credit Card.
8. **Store Credit**. Select when a customer, who also happens to be a consignor, pays for part or all of her purchase using money on account. For example, money owed by the store to her for the sale of consigned items, but which the consignor has not yet been paid for.
9. **Gift Certificate**. Select when payment is made using a **Gift Certificate**.
10. **Bargain Bucks**. This is an example of how custom Payment Types may be created and used. See the section entitled Set Up Payment Types for more details.
11. **Suspend**. Used to Suspend a sale so that it may be resumed later. An example would be if you had a line of customers and the current customer being helped had to run out to his car to retrieve his wallet.
12. **Layaway**. Used to place items on layaway, accept payment for items on layaway, and when an item on layaway is paid off.
13. **Clear Input.** Clears the contents of the keyboard input display. Use this to correct a typo, for example, when $100.00 is entered instead of $10.00.
14. **Cancel**. Cancels the sale.
15. **Finish (F10)**. Click on the Finish button or press the <**F10**> key to complete the sale and print a receipt (if desired).

SELL AN ITEM FOR REGULAR PRICE

PoS Module → F2 - Easy Post

Copyright 2010, Resaleworld.com, Inc.

In most cases items sell for the same price as printed on the price tag. For these items use the **Easy Post** method for transacting the sale.

To Transact (Post) A Cash Sale:

1. Start Point of Sale.
2. Press the **F2** key, or

   Click on the **Easy (F2)** button.

   > ***Tip:*** *The default posting method is Easy Post, so it is really only necessary to press <F2> or click on the Easy (F2) button if you are changing from another posting function such as Change Post, Sale Post, a payment method, etc.*

3. Scan the item number on the item's price tag, or

   Using the keyboard type the account number, followed by a dash, then the item number, and then press the **Enter** key (for instance, for item 43 of account 129 type **129 - 43 <enter>**.

   > ***Note:*** *When using a bar code reader be sure the* ***terminator*** *(the <enter> key) is turned off. (The terminator is sometimes referred to as the* ***termination character****.*

4. Continue scanning bar codes or entering item numbers from the keyboard. Change to another posting mode (Change, Sale, or Refund) if necessary.
5. When all items have been posted, enter the amount received from the customer, then press the **C** (for **C**ash) key or click on the **Cash** button.
6. Press **F10** to Finish (complete) sale.
7. Press the **Y** key to print receipt.

To Transact (Post) A Check Sale:

1. Start Point of Sale.
2. Press the **F2** key, or

   Click on the **Easy (F2)** button.

3. Scan the item number on the item's price tag, or

Copyright 2010, Resaleworld.com, Inc.

Using the keyboard type the account number, followed by a dash, then the item number, and then press the **Enter** key (for instance, for item 43 of account 129 type **129 - 43 <enter>**.

> ***Note:*** *When using a bar code reader be sure the* ***terminator*** *(the <enter> key) is turned off. (The terminator is sometimes referred to as the* ***termination character****.*

4. Continue scanning bar codes or entering item numbers from the keyboard. Change to another posting mode (Change, Sale, or Refund) if necessary.
5. When all items have been posted, enter the amount received from the customer, then press the **K** (for Chec**K**) key. Alternatively, just click on the **Check** button and the amount of the check will default to the sale amount.
6. Enter the check number or customer's license number, and then press the **Enter** key.
7. Press **F10** or click on the **Finish** button to complete the sale.
8. Press the **Y** key to print receipt.

To Transact (Post) a Credit Card Sale:

1. Start Point of Sale.
2. Press the **F2** key, or

   Click on the **Easy (F2)** button.
3. Scan the item number on the item's price tag, or

   Using the keyboard type the account number, followed by a dash, then the item number, and then press the **Enter** key (for instance, for item 43 of account 129 type **129 - 43 <enter>**.

> ***Note:*** *When using a bar code reader be sure the* ***terminator*** *(the <enter> key) is turned off. (The terminator is sometimes referred to as the* ***termination character****.*

4. Continue scanning bar codes or entering item numbers from the keyboard. Change to another posting mode (Change, Sale, or Refund) if necessary.
5. When all items have been posted, click on the appropriate Credit Card button. The amount of the sale will be automatically entered.

Copyright 2010, Resaleworld.com, Inc.

6. Press **F10** or click on the **Finish** button to complete the sale.
7. Press the **Y** key to print receipt.

Related Topics

Change Selling Price

Sell an Item at a Percentage Discount

Refunds

SELL ITEMS AT A DISCOUNTED PRICE

Point of Sale Module ➔ *F3 - Change Post*

Use Change Post to change the price of an item by a specific dollar amount. For instance, an item with the price of $10.00 on the price tag crossed out and replaced with $7.00.

Change Post may also be used to change an item's selling price by a percentage (e.g. 20% off during a sale), however, it is more convenient to use **Sale Post** instead. For more information on Sale Post please see the section entitled Sell an Item at a Percentage Discount.

Post a Sale Requiring a Change in the Selling Price:

1. Start Point of Sale.
2. Press the **F3** key or click on the **Change (F3)** button.
3. The **Calculate Net on Original Price?** dialog will appear. This dialog only pertains to consigned items. The term **Net** refers to the amount the consignor receives.
    a. Select **Yes** to pay the client (consignor) based upon the original asking price.
    b. Select **No** to pay the client (consignor) based upon the new, changed price. (The

Copyright 2010, Resaleworld.com, Inc.

default is No.)

> ***Note**: The Net will change after the changed selling price is entered.*

Example: An item is originally priced for $10.00. The consignment split is 50% to the client. Using Change Post you reduce the price from $10.00 to $8.00. Answer **Yes** to **Calculate Net on Original Price** and the client will receive $5.00 (50% of the original price of $10.00). Answer **No** to **Calculate Net on Original Price** and the client will receive $4.00 (50% of the actual selling price of $8.00.)

4. Next, either:
   a. Scan the item number on the item tag or,
   b. Use the keyboard to type the account number, a dash, and the item number; then press the <**Enter>** key.

      Example: For item 43 of account 129, type **129 - 43**, then press <**enter**>.
5. Enter the new price in the **Selling Price** field, then press **Enter**.
6. Note the amount in the **Net to Consignor** field has been adjusted automatically. You may, however, still change this amount, although it generally will not be necessary if your answer to **Calculate Net on Original Price** was correct.
7. Press <**Enter**> twice (skip the Tax Exempt check box – see the section entitled Post an Item as Tax Exempt for more information.
8. Continue posting items in Change Post mode by scanning bar codes or entering item numbers from the keyboard. Change to another posting mode (**Easy**, **Sale**, or **Refund**) if necessary.
9. When all items have been posted, enter the amount received from the customer and select the payment method (cash, check, credit card, etc.).
10. Press **F10** to complete sale.
11. Enter **Y** to print receipt, and then press the **Enter** key twice.

Related Topics

Sell an Item for Regular Price

Post an Item as Tax Exempt

Sell an Item at a Percentage Discount

Refunding a Sale

Copyright 2010, Resaleworld.com, Inc.

PAYING CLIENTS - OVERVIEW

Use Liberty to calculate and perform all payouts for:

- Clients and Store Accounts with items on **consignment** (clients are paid for consigned items only **after** an item sells and after any pay delay period has passed).
- Clients and Store Accounts from whom items are **purchased** (these clients may be paid for items immediately upon their being added to inventory).

Liberty is not used to pay **Retail Vendors**. Use a separate accounting package such as Quick-Books® to pay retail vendors.

Important Note #1: Failure to use the payout routines in Liberty may lead to incorrect payouts. Do not use other types of Transactions to perform payouts – use only the Payout routines described below.

Important Note #2: NEVER USE ACCOUNTING SOFTWARE TO PAY CLIENTS. Only use Liberty to pay clients. You may link Liberty with, or export information to, your accounting software (e.g. Quicken® or QuickBooks®). Use the accounting software for all other, NON-client specific accounting activities such as paying the rent, payroll, figuring taxes, etc.

There are two procedures for paying clients:

- **One Account at a Time**. This procedure is useful if you pay account holders on demand. Stores that pay clients at anytime would be an example. Another example is stores that pay clients with cash.
- **Multiple Accounts at a Time**. This procedure allows you to specify precisely which account holders are paid. Use this procedure when clients are paid on a regular or semi-regular basis. Paying all consignors on the 10th of the month for all sales made the previous month would be an example.

There are two methods of payment – cash and check. Payments made in cash require the printing of a Cash Statement. It is strongly recommended that Cash Statements always be printed so the store has written proof a cash payout was made. Statements provide a signature line for the client to sign, and should be kept on file by the store – not given to the client – for the store to have a written record of the payout.

Checks may be printed using one of three check formats:

Copyright 2010, Resaleworld.com, Inc.

1. **Laser/Ink Jet** checks have a check in the middle of an 8½ x 11 page, with a stub above and a stub below.
2. **Quicken** checks have a check at the top of an 8½ x 11 page, and two stubs below.
3. **Dot matrix** checks only work in dot matrix printers.

Please Contact Resaleworld to order checks for use with Liberty. Checks ordered from Resaleworld are guaranteed to work with Liberty. Checks ordered from other sources may not work. For more information, please see the section entitled Ordering Computer Checks from Resaleworld.

Liberty is designed to handle multiple bank accounts. If you wish to use more than one bank account to pay clients, see the section entitled Set Up Payment Accounts for more information.

Finally, a number of Payout Defaults are available to customize and simplify making payouts. See the section entitled Set Payment Defaults for more information.

Related Topics

Set Up Payment Accounts

Set Payment Defaults

PAY A CLIENT

Inventory Module → *Task* → *Pay Client*

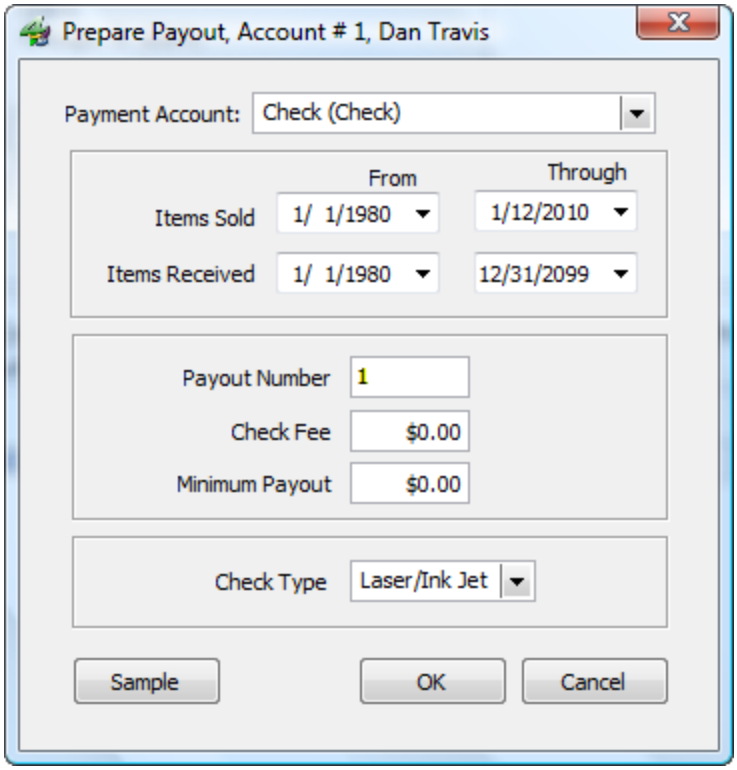
Use this procedure to pay just one account holder. Once the payout has been posted, inventory items are updated in the **Transaction History** and the payouts are recorded in the account's **Payout History**. To make payments to multiple accounts simultaneously, please see the section entitled Pay Multiple Accounts.

> ***Note:*** *Items designated as consigned are payable only after they are sold. Items designated as purchased outright are payable immediately.*

To Pay One Account Holder:

1. In the Inventory Module, lookup the account to be paid.
2. Next, either:
   a. Select **Task** ➔ **Pay Client**, or
   b. Click on the **4. Transactions** tab, then select the **Pay Client** button on the left side of the screen.

   The **Prepare Payout** dialog will display:



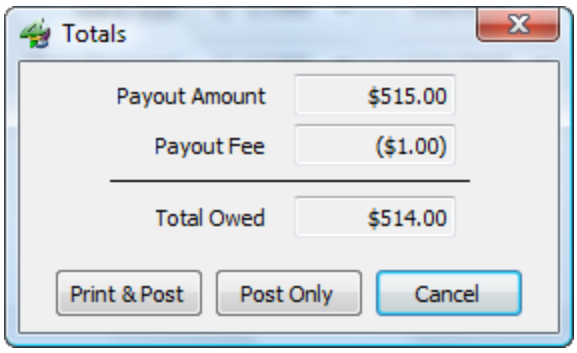
3. First, ensure the correct account is selected in the **Payment Account** drop-down. If you are paying the client with a check, be certain **Check** or a checking account you have created is selected from the drop-down. If you are paying by Cash, be sure to select **Statement (Cash)**. For more information about Payment Accounts, see the section entitled Set Up Payment Accounts.
4. If you wish to print a sample check or cash statement to make sure paper has been properly placed in the printer, click on the **Sample** button. The sample will not show specific details for the account.
5. In the **Items Sold** fields (**From** and **Through**), enter the time period during which items must have sold in order for the client to be paid, then press <Enter>.
6. In the **Items Received** fields (**From** and **Through**), enter the time period during which

Copyright 2010, Resaleworld.com, Inc.

items must have been received into inventory in order for the client to be paid, then press <Enter>.

7. In the **Payout Number** field, enter the payout number (if paying by check, use the check number), then press <Enter>.
8. If there is a fee assessed for payouts, enter it in the **Check Fee** field, then press <Enter>.
9. If there is a minimum payout amount, enter it in the **Minimum Payout** field, then press <Enter>. (If the client is owed less than the amount entered no payment will be made.)
10. If paying by Cash, skip this step. If paying by check, select the type of check. **Dot matrix** checks only work in dot matrix printers. **Quicken** checks have a check at the top of an 8½ x 11 page, and two stubs below. **Laser/Ink Jet** checks have a check in the middle of an 8½ x 11 page, with a stub above and a stub below.

    (Contact Resaleworld to order checks for use with Liberty. Checks ordered from Resaleworld are guaranteed to work with Liberty. Checks ordered from other sources may not work. For more information, please see the section entitled Ordering Computer Checks from Resaleworld.)
11. When the parameters are correct, click on the **Pay** button. The **Totals** dialog will display:



12. Select **Print & Post** if you are printing a Computer Check or Cash Payout Statement. Select **Post Only** if you are hand writing a check. Select **Cancel** to cancel the process.

If you make a mistake, follow the instructions provided in the section entitled Reverse a Posted Payment.

Related Topics

Pay Multiple Accounts

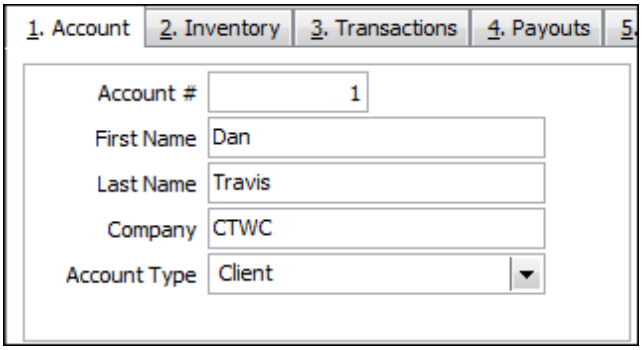
Account Management

Copyright 2010, Resaleworld.com, Inc.

ACCOUNTS OVERVIEW

For each person or business that provides merchandise you need to create an Account. After you create an account, you can begin adding inventory to that account. If you also like to keep records of customers (people who make purchases in your store) you add them as an account as well.

The **Account Type** field in the **Account Detail** window is used to designate the type of account.



There are three types of accounts:

1. **Client:** for consignors and customers.
2. **Retail Vendor:** use to create an account for business that merchandise is purchased from for retail sales.
3. **Store Account:** use to create accounts for merchandise purchased by the store, such as from liquidators, garage sales, owners and/or employees personal belongings, etc.

> ***Tip:*** *When working with accounts, press the <Alt> key and the number preceding the name of the tab. For instance, press Alt + 1 for the Account tab, Alt + 2 for the Inventory tab, etc.*

Related Topics

Add an Account

Training Mode

Copyright 2010, Resaleworld.com, Inc.

ADD AN ACCOUNT

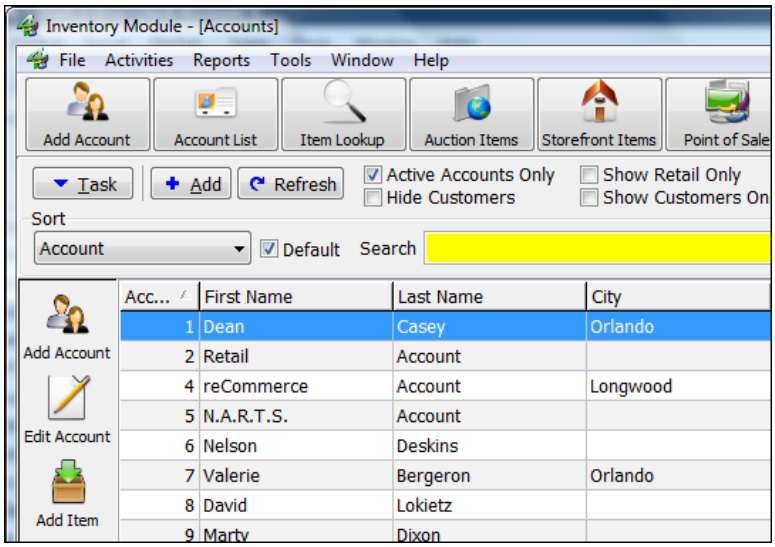
Inventory Module ➔ *Task* ➔ *Add Account*

You must create accounts for clients or businesses that provide goods for sale in your store. Once you have created a client account, you can add inventory received from that client from either Liberty Inventory or Liberty Point of Sale. You can also create accounts for customers. Doing so will allow you to market more effectively to your clientele by tracking customer purchases, develop mailing lists, etc.

To Create An Account

1. There are a number of ways to create a new account. From Liberty Inventory do any one of the following five methods:

   a. Click on the **Add Account** button at the top of the screen (located just under the Main Menu);



   b. Click on the **Add Account** button on the left side of the screen (just under the Task button);

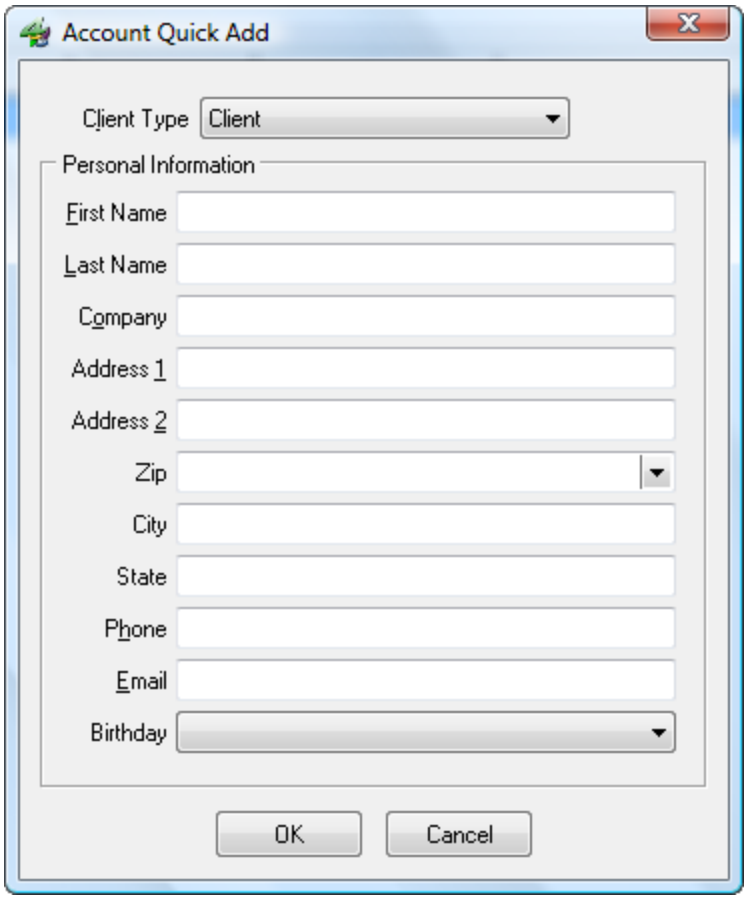
   c. Select **File** from the **Main Menu** (the menu at the top of the screen that says File, Activities, Reports, Tools, Window, Help), then select **Add Account**;

Copyright 2010, Resaleworld.com, Inc.

d. While on the **Account Detail window** click on the **Add** button, or

e. Select **Task** ➔ **Add Account**.

2. The **Account Quick Add** dialog will display:



3. Select the type of account this is from the **Client Type** drop-down box. There are three types of accounts to from which to choose:

- **Client:** for consignors and customers.
- **Retail Vendor:** use to create an account for business that merchandise is purchased from for retail sales.
- **Store Account:** use to create accounts for merchandise purchased by the store, such as from liquidators, garage sales, owners' and/or employees' personal belongings, etc.

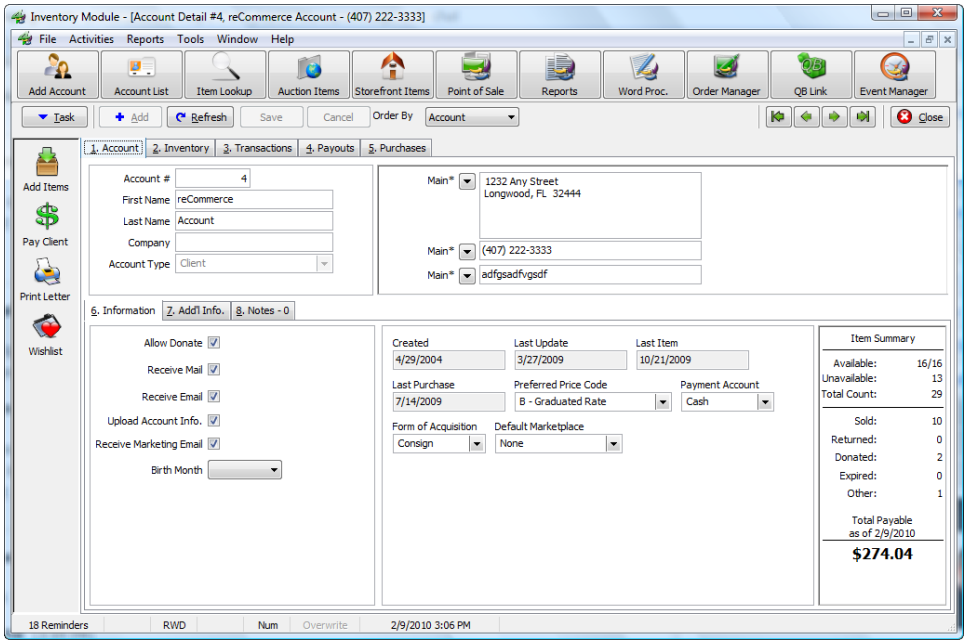
***Note**: Once you have added items to the account, the Client Type cannot be changed.*

4. Fill in the remaining fields for this account (first name, last name, address, etc.).

Copyright 2010, Resaleworld.com, Inc.

> ***Note:*** *If the zip code you enter is new, the New Zip Entry dialog box opens. Once you enter the zip code, city and state information, Liberty remembers this information and will fill in the City and State field for you automatically each time you add a new account. Zip Code Maintenance is performed by selecting* ***Task*** → ***Maintenance*** → ***Zip Codes*** *while on the* ***Account*** *window.*

5. Click on the **OK** button. The **Account Detail** window displays:



Notice that the account number is automatically assigned. The number used is based on the contents of the Next New Account field. You may change the account number at this point if you wish. **Do not change the account number once inventory has been added to an account**.

6. Select the **Form of Acquisition** from the drop-down provided. There are three choices:

   a. **Consign:** Choose when items are consigned (the client is paid only if and when an item sells).

   b. **Purchased:** Choose when the client is paid immediately for items.

   c. **Trade:** Choose when the client is given the choice of either being paid a cash value for items immediately, or being credited a higher trade value that can be used as store credit for purchases.

7. Add more information at your discretion about the account, such as additional addresses and phone numbers, etc.

8. When finished, click the **Save** button.

Related Topics

Copyright 2010, Resaleworld.com, Inc.

Edit Account Information

Enter Additional Addresses, Phone Numbers, and E-Mail Addresses

Enter Additional Account Information

Add One of a Kind Items

Add Retail Items

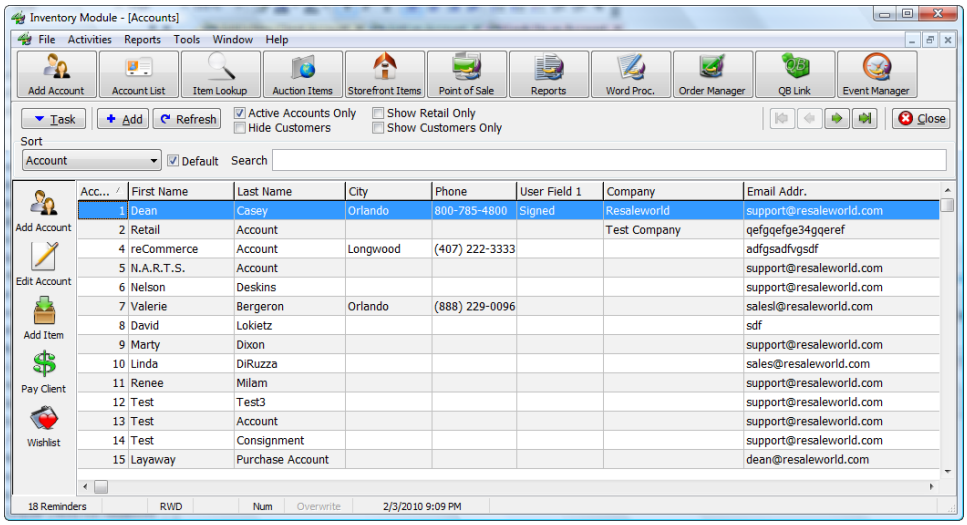
Look Up an Account

Inventory Module → File → Accounts

To Look Up an Account:

1. From Liberty Inventory either:
   a. Click on the **Account List** button (located just below the Main Menu), or
   b. Select **File** → **Accounts** from the Main Menu.

The **Accounts** screen will display:



2. To view all accounts, make sure the **Active Accounts Only** check box does not have a check mark in it. (For more information on deactivating accounts, please see the section entitled Deactivating an Account.
3. If you wish to view Customer as well as Consignor and Store Accounts, remove the check in the **Hide Customers** check box.
4. To view only Retail Accounts, click on the **Show Retail Only** check box.
5. Sorting accounts can be accomplished in two ways:
    a. Click on the column header of the field you wish to sort on. For instance, clicking on the Last Name header (at the top of the list) will sort all accounts by last name.
    b. Use the **Sort** drop-down list to choose the most convenient method to lookup the account. Do this by clicking on the downward pointing triangle at the right edge of the drop-down box. Choices include:
        - Account Number
        - First Name
        - Last Name
        - City
        - Phone
        - User Field 1
6. To pinpoint the account, type in part or all of a word that would be found in the selected **Search** field.
7. Use the mouse, up and down arrow keys, and/or the <Page Up> and <Page Down> keys to navigate through the list of accounts. When the account you wish to view is high-lighted, either press the <Enter> key or double-click on the account.

    Example: To find Tom Johnson's account, select Last Name from the Sort drop-down list. Enter ***Johnson*** in the Search text box. Note that if you have more than one account with the last name Johnson, the Johnson with the lowest account number will be listed first and highlighted.

***Tip**: Set the lookup to default to your preferred Sort by first selecting your favorite Sort method (Last name, account number, or phone number, etc.). Next place a check in the Default check box located to the right of the Search field.*

Related Topics

Add an Account

Training Mode

Copyright 2010, Resaleworld.com, Inc.

EDIT ACCOUNT INFORMATION

Inventory Module → *1. Account Tab*

Warning: Do not change the Account # - doing so may lead to adverse effects such as items posting to the wrong account or not at all.

To Change Account Information

1. Lookup the client account which you wish to make changes to.
2. Click in the field(s) you wish to change and make the change(s) necessary.
3. Click on the **Save** button for changes made to any fields other than the address, phone and e-mail sections.

> ***Note**: The **Account Type** can only be changed before any items have been added to the account. Once the first item has been added to an account it is no longer possible to change the Account Type. If you have a client who has, for instance, both consigned and retail items, it will be necessary to create two accounts for the client, one of each type.*

Related Topics

Add Additional Addresses And Phone Numbers

Additional Info

Copyright 2010, Resaleworld.com, Inc.

ADD ADDITIONAL ADDRESSES AND PHONE NUMBERS

Inventory Module → *1. Account Tab*

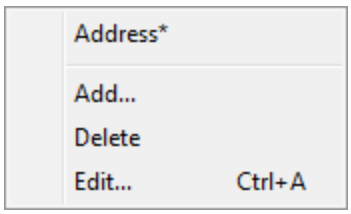
Liberty allows you to store multiple postal addresses, e-mail addresses and phone numbers for each account. Following is a description of each of these three procedures.

To Manage Multiple Addresses

Note: When there are multiple addresses, one must be the **Primary** address. The Primary Address is the address that will be printed on payouts (checks), mailing labels, and in reports that contain an address (such as the Account List report). When the Primary address is displayed, an asterisk will appear between the Address label and the button containing the downward pointing triangle.

1. Lookup the client account to which you wish to make changes..
2. Immediately to the left of the Address field is a button that contains a downward pointing triangle:

   Click on this button, and the **Address** menu will display.
3. **To Add an Address:**
   a. Select **Add** from the menu. The **Edit Address** dialog will display:

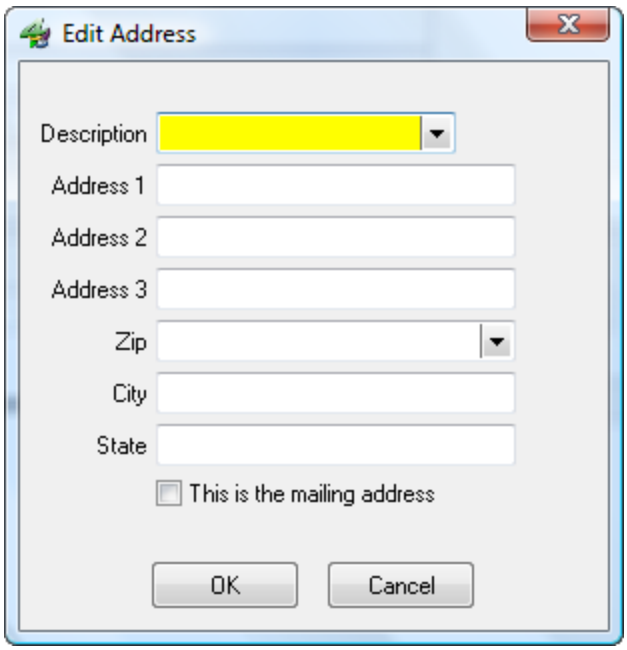
   b. Select Home or Work from the **Description** field drop-down, or type in a different description (such as vacation or FL office).
   c. Fill in the rest of the information, and check the **primary** box if appropriate.

d. Select the **OK** button.

e. Click the **Save** button located to the right of the **Task** button.

4. **To Change an Address:**

a. Select **Edit** from the menu. The **Edit Address** dialog will display:



b. Make the necessary changes.

c. Select the **OK** button.

d. Click the **Save** button located to the right of the **Task** button.

5. **To Delete an Address:**

a. Display the Address to be deleted. (If it is not already displayed, click on the button with the downward pointing triangle, then select the address to be deleted from the menu.)

b. Select **Delete** from the menu.

To Manage Multiple Phone Numbers

Note: When there are multiple phone numbers, one must be the **Primary** phone number. The Primary phone number is what will appear in the Lookup screen when the account is being looked up. The Primary phone number will also be the number printed in reports that contain a phone number (such as the Account List report). When the Primary phone number is displayed, an asterisk will appear between the Phone Number label and the button containing the downward pointing triangle.

Copyright 2010, Resaleworld.com, Inc.

1. Lookup the client account to which you wish to make changes.
2. Immediately to the left of the Phone Number field is a button that contains a downward pointing triangle. Click on this button, and the **Phone Number** menu will display.
3. **To Add a Phone Number:**
    a. Select **Add** from the menu. The **Edit Phone Number** dialog will display.
    b. Select Home or Work from the **Description** field drop-down, or type in a different description (such as vacation or Hawaii office).
    c. Enter the phone number and check the **primary** box if appropriate.
    d. Select the **OK** button.
    e. Click the **Save** button located to the right of the **Task** button.
4. **To Change a Phone Number:**
    a. Select **Edit** from the menu. The **Edit Phone Number** dialog will display.
    b. Make the necessary changes.
    c. Select the **OK** button.
    d. Click the **Save** button located to the right of the **Task** button.
5. **To Delete a Phone Number:**
    a. Display the Phone Number to be deleted. (If it is not already displayed, click on the button with the downward pointing triangle, then select the phone number to be deleted from the menu.)
    b. Select **Delete** from the menu.

To Manage Multiple E-Mail Addresses

Note: When there are multiple e-mail addresses, one must be the **Primary** e-mail address. The Primary e-mail address is the address that will be used when e-mail reports are run (including the Closed Auctions, Open Auctions, Open Orders, Payout Detail, and Transaction History emails). When the Primary e-mail address is displayed, an asterisk will appear between the e-mail address label and the button containing the downward pointing triangle.

1. Lookup the client account to which you wish to make changes.
2. Immediately to the left of the Email Address is a button that contains a downward pointing triangle. Click on this button, and the **Email Address** menu will display.
3. **To Add an Email Address:**

Copyright 2010, Resaleworld.com, Inc.

a. Select **Add** from the menu. The **Edit Email Address** dialog will display.

b. Select Home or Work from the **Description** field drop-down, or type in a different description (such as vacation or London office).

c. Fill in the rest of the information, and check the **primary** box if appropriate.

d. Select the **OK** button.

e. Click the **Save** button located to the right of the **Task** button.

4. **To Change an Email Address:**

a. Select **Edit** from the menu. The **Edit Email Address** dialog will display

b. Make the necessary changes.

c. Select the **OK** button.

d. Click the **Save** button located to the right of the **Task** button.

5. **To Delete an Email Address:**

a. Display the Email Address to be deleted. (If it is not already displayed, click on the button with the downward pointing triangle, then select the address to be deleted from the menu.)

b. Select **Delete** from the menu.

Related Topics

Add an Account

Add Notes to an Account

Edit Account Information

CUSTOMIZE THE ACCOUNT DETAIL WINDOW

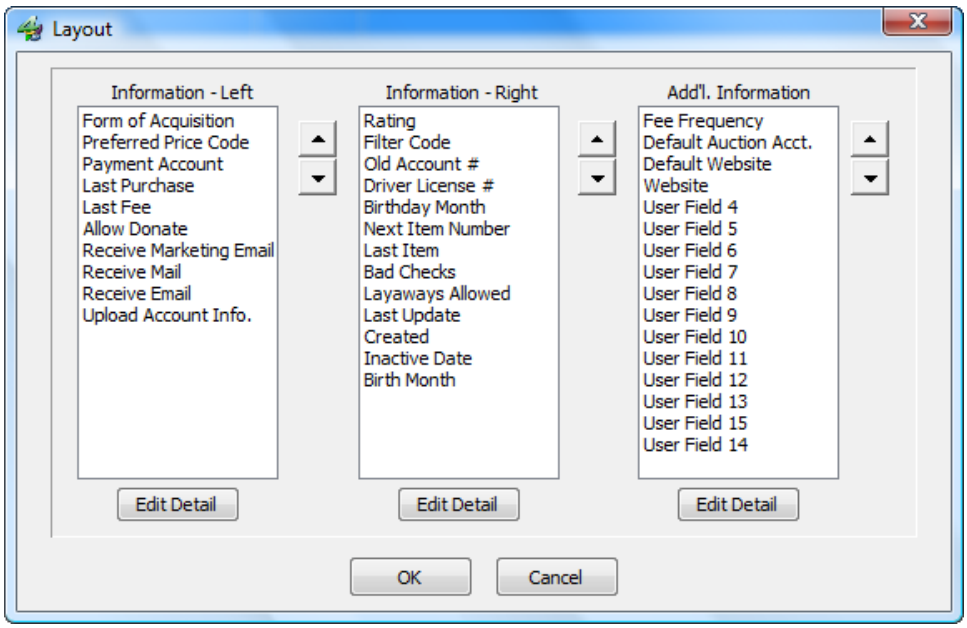
Inventory Module → *Task* → *Maintenance* → *Account Field Layout*

You can move, rename, reposition and hide account information fields that appear in the **6. Information** and **7. Add'l Info** tabs. This allows account information to show in the manner most convenient to the way you do business.

To Customize the Account Detail Window

1. Lookup any Account so the Account Detail window displays.
2. Select either:
   a. **Task → Maintenance → Account Field Layout**, or
   b. Right-click anywhere in the lower half of the Account Detail window and click on **Account Field Layout**.

   The Account Field **Layout** dialog will display:



3. **To Move Fields** from area to another, click on the selected field and drag it to the desired column.
4. **To Reorder Fields** in a particular column, click on the up or down arrow button located to the right of the column.
5. **To Rename a User Field** (there are 15 located initially in the right column, which controls the Add'l Info tab's contents), highlight the desired field, then click on the **Edit Detail** button located beneath the column in which the field is located. Change the **Caption** for the field, then click the **OK** button.
6. **To Change the Width of a Field**, highlight the desired field, then click on the **Edit Detail** button located beneath the column in which the field is located. Change the **Width**

Copyright 2010, Resaleworld.com, Inc.

for the field, then click the **OK** button.

7. When finished click on the **OK** button.

Related Topics

The Additional Info Window

Set Item Entry Field Preferences

TAX EXEMPT ACCOUNTS

Inventory Module ➔ *Task* ➔ *Tax Exemption Info*

On occasion clients representing non-profit or governmental organizations may wish to set up a Tax Exempt Account.

Set Up a Tax Exempt Account:

1. Lookup the account.
2. Select **Task** ➔ **Tax Exemption Info**.
3. Enter the exemption information in the **Exemption Number** and **Exemption State** fields.
4. Select **OK** when finished.

Ring Up a Tax Exempt Sale for a Tax Exempt Customer:

1. In PoS, start the sale by looking up the tax exempt customer. Do this by selecting **F9**.
2. Ring up the sale.

***Note**: The client's Tax Exempt number will appear on the sales receipt.*

Copyright 2010, Resaleworld.com, Inc.

Related Topics

Post an Entire Sale as Tax Exempt

Track Sales by Customer

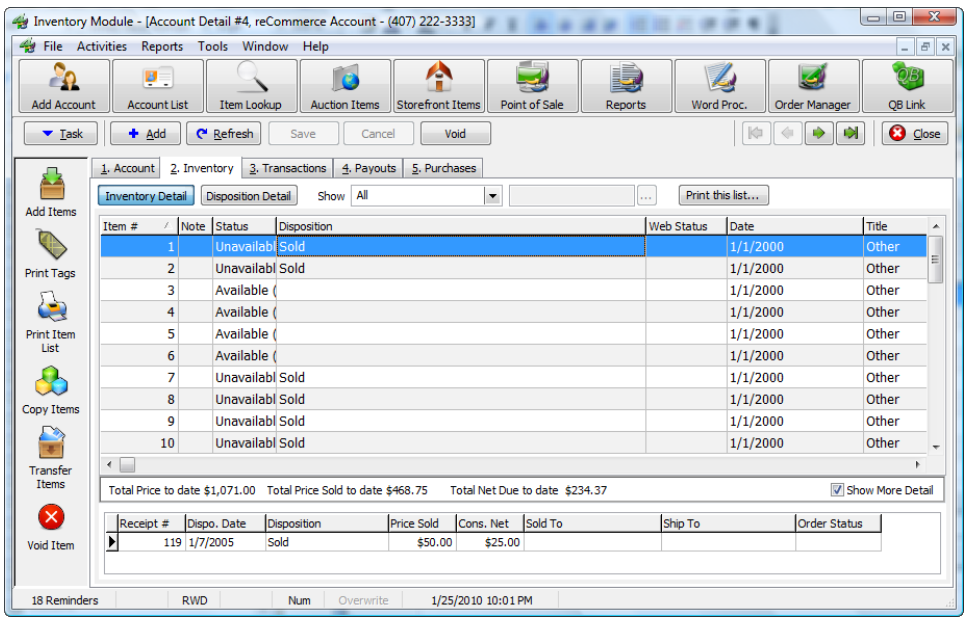
VIEW ITEMS IN AN ACCOUNT

Inventory Module ➔ *2. Inventory Tab*

To display (view) items after they have been added into an account, it is necessary to be in the Inventory screen.

To View All Items in an Account:

1. Lookup the account.
2. Click on the **2. Inventory** tab. Below is a sample inventory screen:



In addition to the fields shown in the figure above, additional fields may be viewed by moving the scroll bar at the bottom of the screen to the right. Fields not shown but available by scrolling to the right include the Retail Price, Price Code, Item Fee, etc.

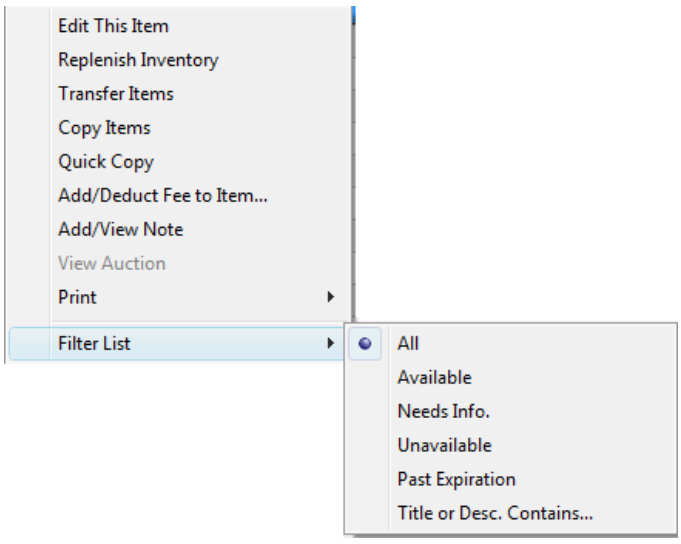
Clicking on the **Disposition Detail** button will show just information pertaining to items' current status.

Clicking on the **Show More Detail** check box (located at the extreme lower right of the screen) displays additional information about the highlighted item. This information includes the number of the receipt which the item was a part of the sale of, the disposition date (date the item's disposition last changed), the item's disposition, price sold, net payable to the consignor, who the item was sold to, who the item was shipped to (when the item is a web sale), and the item's order status.

Filtering the list allows you to view items based on their **status**. (Available, Sold and Not Paid, etc.) An example of how this is useful is you may view all Items which have sold but for which a consignor still needs to be paid. In this case you would select the **Sold and Not Paid** filter, which, once chosen, will cause only those items which have sold but for which the consignor has yet to be paid to appear on screen.

To View Just Items with a Particular Status:

1. Right-click on any item listed in the Inventory screen. A menu will appear.
2. Move the mouse cursor over the **Filter List** menu option. A sub-menu will appear as shown below:



3. Select a **Filter** option from the sub-menu. When a selection is made, the list of items will be filtered to meet your criteria.

Copyright 2010, Resaleworld.com, Inc.

> ***Note:*** *Filtering can also be accomplished when viewing the Inventory screen by selecting* ***Task*** → ***Filter List****.*

Related Topics

View Inventory

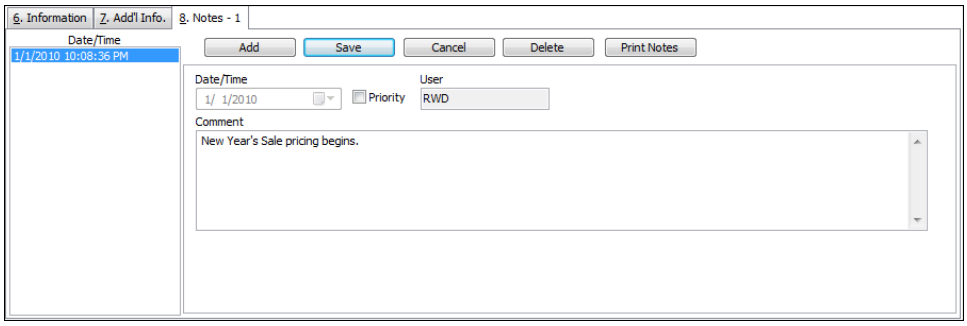
ADD NOTES TO AN ACCOUNT

Inventory Module → *8. Notes Tab*

Use the following procedure to record notes about a particular account. You can view the account notes from the Accounts window or view and print comments for multiple accounts using the **Account Notes Report** in Liberty Reports.

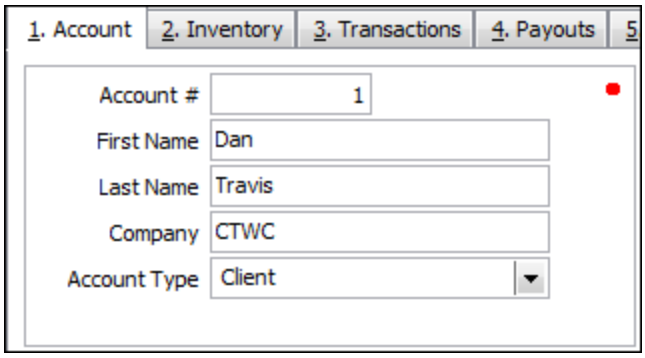
Add a Note to an Account

1. Lookup the account.
2. Click on the **8. Notes** tab. The **Notes** dialog will display:



3. Click on the **Add** button.
4. The date and time will automatically display in the **Date/Time** field.
5. Click on the **Priority** check box if this is a priority note. When an account contains a Priority Note or Notes, a blinking **red** dot will appear next to the account number field on

the **1. Account** tab:



> ***Note**: You can filter the Account Comments report in Liberty Reports based on this setting - this way you can generate a report of just Priority notes. An account may have more than one priority note.*

> ***Note**: When an account has a priority comment, the comment count on the Account window (under the phone and e-mail fields) turns blue.*

6. Type your notes in the **Comment** text box.
7. Click the **Save** button when finished.

Make Changes to a Note

1. Lookup the account.
2. Click on the **8. Notes** tab.
3. Select the Note from the list in the left hand column under **Date/Time**.
4. Make the changes as necessary.
5. Click the **Save** button when finished.

Related Topics

Add a Note to a Transaction

Add a Note to an Item

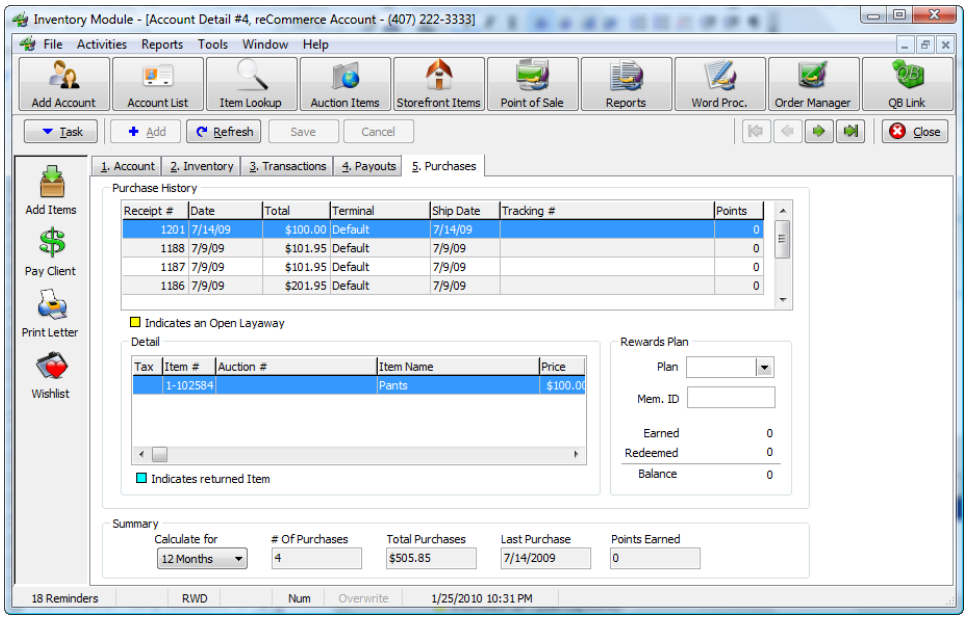
Copyright 2010, Resaleworld.com, Inc.

VIEW HISTORY OF ACCOUNT PURCHASES

Inventory Module → *5. Purchases Tab*

To View A History Of Purchases Made By A Particular Client:

1. Lookup the account.
2. Click on the **5. Purchases** tab. The Purchase History screen will display:



3. Select the time period for which you wish to view purchases by selecting from the **Calculate for** drop-down menu.

Related Topics

Track Sales by Customer in Point of Sale

Order Manager Overview

Copyright 2010, Resaleworld.com, Inc.

SENDING AUTOMATED EMAILS WITH THE EVENT MANAGER

Inventory Module ➔ *Event Manager Button*

The **Event Manager** is used to automatically perform the task of sending emails. Tasks are created based on a change in an item's **Status**. When the status of an item changes, for instance, from **Ready** to **Active**, the change is termed an **Event**.

When an event occurs for which a task has been created in the Event Manager, an email is automatically created to send to the client. The email is put in a queue and is automatically sent with the next synchronization. Following are a few examples of Events:

- Send an email to the consignor when their item is first listed. The Event in this case is the change in the item's status to **Active**.
- Send an email to the consignor when an item has sold. The Event in this case is the change in the item's status to **Paid**.
- Send an email to the buyer when the item has shipped. The Event in this case is the change in the item's status to **Shipped**.

The Event Manager can create tasks for either **Web Item** status changes or **Order Manager** status changes. Events based on a Web Item status change will generate emails for the Consignor (Seller). Events based on an Order Manager status change will generate emails for either Consignor or the Buyer.

Web Item Statuses

- Not Ready
- Ready
- Active
- Closed
- Paid
- Relist?
- Relisted

Order Manager Statuses

- Completed Orders
- Shipped Orders
- Paid Orders
- Unpaid Orders
- User Defined Statuses

Copyright 2010, Resaleworld.com, Inc.

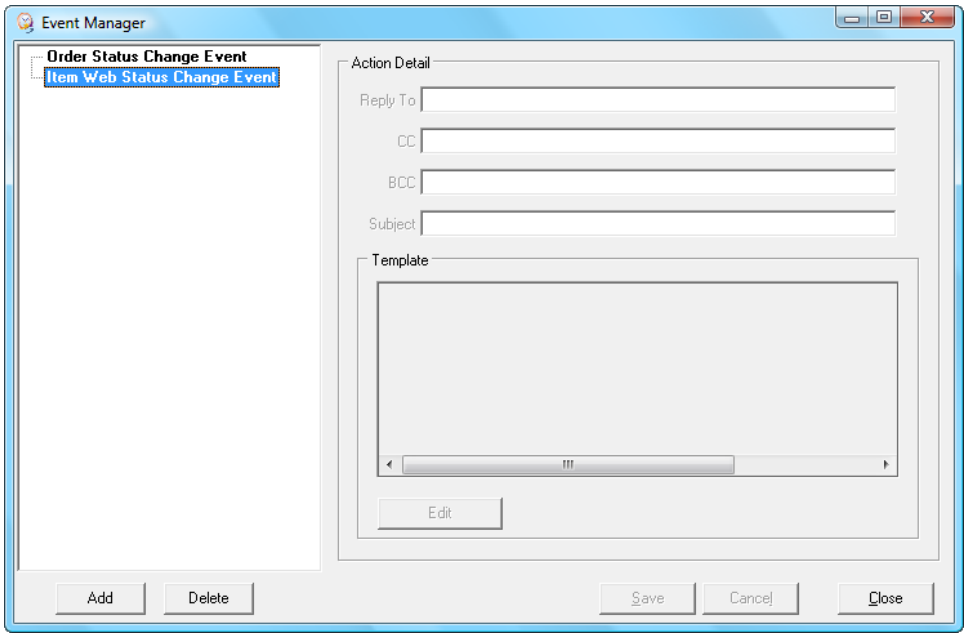
- Not Sold on Relist
- Error

Each Event has an **HTML Template** created. Templates are stored in **C:\RWD\EventManager**. Templates function much like the Auction HTML Templates. They can be customized, various macros (merge fields) can be added or removed, etc. This allows email Templates to match listing Templates for a professional appearance and consistency.

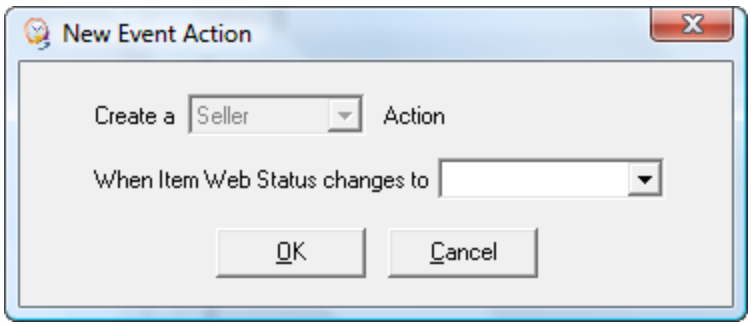
To Create an Event:

1. In the Inventory Module, select the Event Manager button located at the top of the screen.

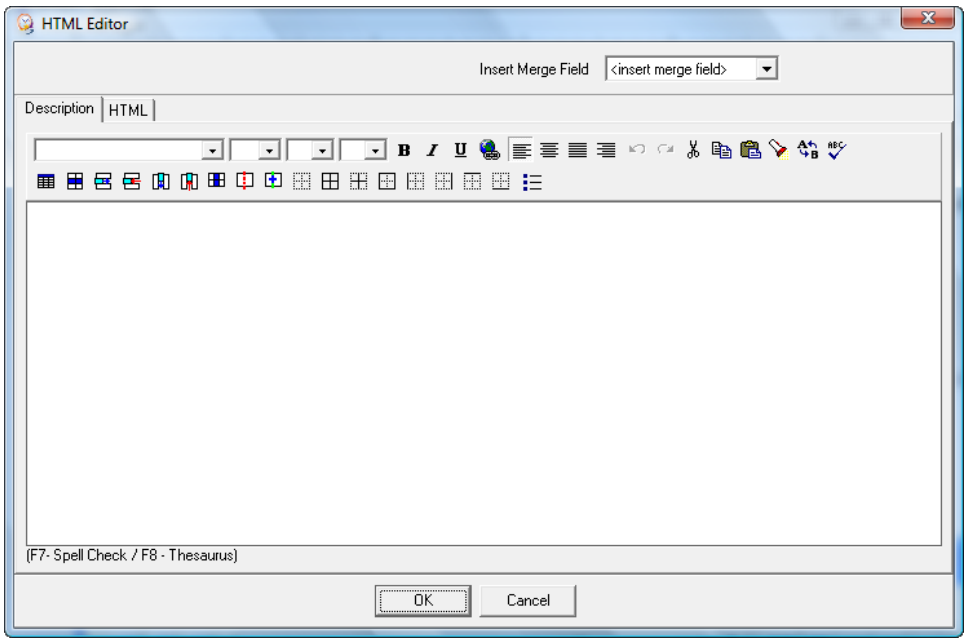
The Event Manager screen will display.



2. Highlight the type of event to be created (Web Item or Order Manager).
3. Select the **Add** button. The **New Event Action** dialog will display:



4. If the Event is based on an Order Status change, select whether to create a Buyer or Seller Event from the first (top) drop-down. Selecting Buyer sends an email to the purchaser. Selecting Seller sends an email to the consignor.
5. Select the status you want the Event to look for (e.g. Active, Relist, Unpaid, Paid, etc.) from the **When Order Status Changes to** drop-down.
6. Select the **OK** button.
7. Enter a **Reply To** address. This is required – without this emails will not be sent.
8. Optionally enter a **CC** or **BCC Address**. This might be done to send a copy of the email(s) to another email address for your records.
9. Enter a **Subject**.
10. Click the **Edit** button. The **HTML Editor** will display:



11. Enter the text of the email. Note the Editor defaults to the **Description** tab: use it to enter the body of the email in standard text. Use the buttons to change the appearance of the text (e.g. bold, italics, underline, font, pitch, color, bullets, numbers, indent, etc.). Use the **Insert Merge Field** drop-down to insert data contained in Liberty into the email. Click on the **HTML** tab to enter or edit the text using HTML.
12. When finished entering the email select the **OK** button.
13. Select the **Save** button to save the Event.

    Once an Event is created, whenever an item reaches a status contained in an Event an email will be created, queued and sent with the next Synchronization.

Copyright 2010, Resaleworld.com, Inc.

> ***Note**: In order for emails to be sent to a Consignor, their account must have the following:*
>
> *1. A **Primary Email Address** and,*
>
> *2. The **Receive Email** option checked on the **Add'l Info** tab (#7) of the Consignor's account.*

Create a Clickable Link for an [[AuctionId]] Merge Field

1. Go to the HTML tab of the email body.
2. Replace the [[AuctionId]] Merge Field with the following line of code:

   [[AuctionId]]

Related Topics

Using Reports to Send Client Emails

DEACTIVATING AN ACCOUNT

Inventory Module → Task → Maintenance → De-activate Account

Deactivating an account prevents the account from being displayed in the Account Lookup window. This is a useful feature due to the fact that accounts cannot be deleted from the database. (There are a variety of reasons for this, including maintaining security, helping protect against employee theft, and maintaining the integrity of the computer database.)

To Deactivate an Account

1. Lookup the account.
2. Select **Task → Maintenance → De-activate Account**.

Copyright 2010, Resaleworld.com, Inc.

Related Topics

Reactivating an Account

Look Up an Account

REACTIVATING AN ACCOUNT

Inventory Module → Task → Maintenance → Activate Account

To Reactivate an Account:

1. Display the Account List by selecting the **Account List** button, which is located just under the Main Menu. (Or select **File → Accounts** from the Main Menu.)
2. Make sure that both the **Active Accounts Only** and **Hide Customers** check boxes are unchecked.
3. Lookup the account.
4. Select **Task → Maintenance → Activate Account**.

Related Topics

Deactivating an Account

Look Up an Account

Copyright 2010, Resaleworld.com, Inc.

Inventory Management

Copyright 2010, Resaleworld.com, Inc.

INVENTORY OVERVIEW

As you receive inventory you will add it to Liberty Inventory as items in accounts. The inventory entry process may seem a bit complex at first, but in reality it is very straightforward. To learn how to enter items faster, see How to Enter Items Faster.

To Add Inventory To Liberty:

1. Follow the instructions to set up Liberty for first use.
2. Create an account for the inventory to be placed in. The account may be either a **Client**, **Store**, or **Retail Vendor** account depending on the nature of the inventory being added.
3. Select **Task** → **Add Item,** or click on the **2. Inventory** tab and then click on the **Add** button, or click on the **Add Item Icon**. This will bring you to the Item Entry window. Enter the inventory.
4. Print price tags and item lists as needed.
5. Use Liberty Point of Sale to post items as sold.

Related Topics

Definition of Consigned, Purchased, and Retail Items

Item Entry Windows - Overview

One of a Kind Item Entry Window

Retail Item Entry Window

Add One of a Kind Items

Add Retail Items

How to Enter Items Faster

Updating Auction Items

Copyright 2010, Resaleworld.com, Inc.

ITEM ENTRY WINDOWS - OVERVIEW

Liberty handles two types of items:

1. Items that are unique and usually only available as **One of a Kind**. These can be consigned or bought outright from an individual or business. These items are referred to as **One of a Kind** items.
2. Retail items that are usually available from manufacturers in quantity, e.g. 6 silver plated forks or 10 size 15 neck, 34/35 sleeve long sleeve white dress shirts. These items are referred to as **Retail** items.

As such, there are two **Item Entry Windows**:

1. One of a Kind Item Entry window, and
2. Retail Item Entry window.

Which window appears - **One of a Kind** or **Retail**, depends on the Account Type. When the Account Type is **Client** or **Store Account**, then only the **One of a Kind** Item Entry window appears. When the Account Type is **Retail Vendor**, then only the Retail Item Entry window appears. .

> ***Note:*** *An account cannot contain both One of a Kind items and Retail items.*

Important Information: For maximum speed and efficiency Liberty has been designed to make adding inventory **Mouseless**. This means that when entering inventory it is not necessary to use the mouse. As you enter items into Liberty, take time to discover how fast you really can enter inventory as a result of this sophisticated design approach. Most importantly, watch how Liberty **Auto Fills** as you type information. Most of the time it is only necessary to type two or three characters instead of an entire category, attribute, brand, or other word or phrase.

Related Topics

Training Mode

Inventory Overview

One of a Kind Item Entry Window

Updating Web_Items

Retail Item Entry Window

Definition of Consigned, Purchased, and Retail Items

Copyright 2010, Resaleworld.com, Inc.

Definition of Consigned, Purchased, Trade and Retail Items

Consigned: An item brought in by a client - usually an individual - that is sold on consignment. The client is paid a percentage of the item's selling price if (and only if) the item sells. The client is not paid until after the item sells. Consigned items must be entered into accounts with an **Account Type = Client or Store Account**, and with the **Form of Acquisition = Consigned**.

Purchased: An item brought in by a client - usually an individual - that is purchased from the client immediately. Purchased items must be entered into accounts with an **Account Type = Client or Store Account**, and with the **Form of Acquisition = Purchased**.

Trade: An item brought in by a client – usually an individual – that can either be exchanged for cash value or a higher amount is given for the item as a trade value, which the client can later use for store credit purchases. Trade is a temporary state for an item, as the trade must be processed before the item can be sold (Items are set to be Purchased once a trade is processed). Trade items must be entered into accounts with an **Account Type = Client or Store Account**, and with the **Form of Acquisition = Trade**.

Retail: An item that is purchased from a Retail Vendor. Often these items are bought in quantity - for instance, a dozen earrings or five lamps. Items must be entered into accounts with an **Account Type = Retail Vendor**. **There is no Form of Acquisition choice**, as retail items are always purchased.

One of a Kind Item Entry Window

Inventory Module ➔ *Task* ➔ *Add Item*

Copyright 2010, Resaleworld.com, Inc.

This section describes adding inventory for both in store and online sales. Liberty for Consignment is designed for selling items in the store only: it does not contain the necessary functions to list and sell items online. To sell items online, please contact Resaleworld to purchase Liberty for Trading Assistants.

*(**Editor's Note:** For simplicity both Liberty for Consignment (aka L4C) and Liberty for Trading Assistants (L4TA) are referred to simply as **Liberty** in their respective manuals and online help files.)*

The One of Kind window's fields are described below. Please note the following conventions in use when describing fields appearing in the **Item Detail** tab:

- Fields marked with an asterisk * are required for all items.
- Fields marked by a double asterisk ** are required in order to sell an item online.
- Fields marked by a … are assigned by Liberty and cannot be changed by the user.

The lower part of the Item Entry window displays a list of items entered. This is known as the **Item Entry Grid**. This Grid is empty when the Item Entry window is first displayed. The Grid only displays those items entered while in the Item Entry display. When you exit the Item Entry window the Grid is emptied, but the items entered ARE on file, and may be viewed on the **Inventory** tab.

> ***Notes**: The **Save** button must be selected to save information.*
>
> *If a field described below does not appear on screen, it may be a **Hidden** field. To show a hidden field, select **Task** → **Edit Layout**. The Edit Layout dialog will appear. Hidden fields will appear in gray. To **Show** a field, highlight the field then click the **Show** button. For more information about Editing Layouts, see the section entitled Set Item Entry Field Preferences.*

One of a Kind Item Entry Window Fields – Item Detail Tab

Item Number…	Assigned by the system. Each account starts at item number 1. The next item number can be changed by changing the number in the Next Item Number field on the Add'l Info screen.
Status…	Current status of the item. Status types include **Available**, **Not Available**, and **Needs Info**. The status **Available** means the item is available for purchase.

Copyright 2010, Resaleworld.com, Inc.

The status **Needs Info** indicates the item is missing important information and cannot be sold until that information is entered. An item without a price, for example, would have a status of **Needs Info**.

The status **Not Available** indicates the item has a Disposition of Sold, Donated, Returned (to the client), Being Sold, Layaway, Expired, Ordered Online, etc.

Purchase Method There are three choices: **Consign**, **Purchase, and Trade**. Payment for consigned items is made only after an item sells. Payment for purchased items is made at any time. Trade items are converted into purchased items once the trade has been processed – until then, they cannot be sold through PoS. The term **Form of Acquisition** means the same thing.

> ***Note:*** *The Cost field is left blank for items entered as* ***Consigned.*** *The Price is calculated by Liberty when the item sells. The only exception to this is when a Preset Net is used.*
>
> *A* ***Cost*** *must be entered when an item is designated as* ***Purchased****.*
>
> *Trade items can be entered with or without a* ***Cost****. The* ***Cost*** *is considered to be the* ***Cash Value*** *for the item. If no* ***Cost*** *is entered, the* ***Cash Value*** *is calculated automatically based on the* ***Price Code*** *set for the item. When trade items are processed, the* ***Cost*** *is automatically updated to reflect the value granted for the item (either the* ***Cash Value*** *or the* ***Trade Value****), and the Purchase Method is automatically changed to Purchase.*

Date Received* Date the item is entered into inventory. Liberty defaults to the system date. Change the date if necessary by typing in a new date or clicking on the 6 and selecting the date from the calendar that appears.

> ***Note:*** *When the date is changed the new date will carry forward to subsequently entered items.*

Category* Select the Level 3 Category that best describes this item.

Copyright 2010, Resaleworld.com, Inc.

To save time and keystrokes Liberty will auto fill the Category field as you type in the Category field.

Alternatively, press **F2** and the Select Category dialog will appear, from which you may use the mouse or a combination of letters and arrow keys to choose a Category.

To add a Level 3 Category on the fly, press **F3**, and the Category Quick Add dialog will appear. Select an existing Level 1 and Level 2 Category from the drop-down menu, then enter a new Level 3 Category. Next, select a Tax Type, then click OK.

> ***Note:*** *The error message* ***Cannot insert duplicate key row in object 'CATEGORY' with unique index'AK_ PARENT'.*** *indicates you are trying to enter a duplicate Level 3 Category. Click* ***OK*** *and then choose that Category as you would normally.*

Please see Categories Overview and Add, Change, and Delete Categories for more information.

Attributes & Attribute Panel

Select the appropriate attributes for this item. To help save time entering items, all Attributes make use of auto fill.

Which Attribute(s) appear in the Attribute Panel depends on the Category selected for the item. Specific Attributes may be assigned to specific Categories. See Categories Overview and Set up Attributes for more information.

In addition to entering new Attribute Values by using the Category Editor, a new Attribute Values may also be added while entering items.

To Add A New Attribute Value While In The Item Entry Screen:

1. Place the cursor in the **Attribute** field.
2. Press the **<F2>** key.
3. Enter the new **Attribute Value** in the dialog.
4. Click **OK**.

Title…

A phrase created by Liberty combining selected fields, most often the Attribute Types, Brand, and Level 3 Category fields. The default syntax is:
{Attribute(s) + Brand + Level 3 Category}

Copyright 2010, Resaleworld.com, Inc.

Examples:
Peach Size 10 Ann Taylor Blouse
Oak 60 inch Taylor Table

The purpose is to provide items listed online with an Item Title, and to create a consistent way to reference items within Liberty. In addition to appearing in the Auction Ads and HTML Templates, Titles are used in the Item Lookup, Wish List, and certain reports.

While Liberty automatically creates the **Title**, you may change it for any reason here in the Item Entry screen.

In addition, the **Maintain Category Attributes** dialog provides the ability to select which Attributes are, and which are not, included in the Title. Please see the sections entitled Overview of Attributes and Show Attributes in Item Titles for more information.

> ***Note**: When an item is edited after it has been saved, the Title must be manually changed. This is because the Title does not automatically update.*

Description

Important Note: This field is not part of the Auction Template and is therefore NOT displayed online.

Describe the item as much or as little as you wish. The information entered into this field will appear on the price tag.

Pressing the **F3** key launches the **Extended Description** dialog, which is covered immediately below.

Pressing the **F2** key while in the Description field will bring up the Item Description popup. See Set Up Item Descriptions for more information.

Pressing **F7** will bring up the **Spell Checker**. See Set Up Spell Checking for Item Descriptions for more information.

Pressing **F8** will bring up the **Thesaurus**.

Extended Description

Important Note: This field (not the Description field) is part of the Auction Template and is thus displayed online.

Note the **HTML** tab at the top of the dialog. Since the information entered into the Extended Description will appear in the Auction Ad, coding the description in HTML allows the look of

Copyright 2010, Resaleworld.com, Inc.

the ad to be precisely determined and customized to fit the situation by utilizing the different fonts, colors, bullets, numbers, etc. available on the HTML tab.

If you are using **Attributes**, do not repeat Attribute information in the Description field, as doing so is redundant and wastes time.

Price

Enter the price you set to sell the item in your store at, and that you wish to appear on the price tag. If like items of the same Category are priced the same, consider using the Pricing Guide.

> ***Note:*** *When selling online items, this is your base price and does not include any fees.*

Retail Price

If appropriate, enter the original retail price for the item. This price may be printed on the price tag.

> ***Note:*** *This is a great tool to show a potential buyer what the item cost when new if they are receiving a large discount.*

Copyright 2010, Resaleworld.com, Inc.

Cost/Net

For items with a Purchase Method of Purchase: enter the amount to be paid to the Seller for the item.

For items with a Purchase Method of Consign: leave this field blank (zero) UNLESS you wish to assign a **Preset Net** amount to the item.

> ***Note:*** *The Cost field is left blank for items entered as* ***Consigned****: it is calculated by Liberty when the item sells. The only exception to this is when a Preset Net is used (see below).*
>
> *A* ***Cost*** *must be entered when an item is designated as* ***Purchased.***

A **Preset Net**is an amount entered into the net field to guarantee the consignor receives a specific amount of money if the item sells instead of an amount based on a percentage of the sale. For example, if a consignor brings in an expensive item, she might say *I don't want you to sell this item unless I get at least $450 for it.* You figure you can sell it for $600 - $700, but since you usually sell items based on a 50/50 split, to accept this item an exception must be made.

By entering $450 in the Cost/Net field, the consignor is guaranteed that no matter how much the item sells for, she will receive $450. This is because any figure other than zero entered into the Net field will **override** the regular consignment split (which is defined by the item's Price Code).

> ***Note:*** *Price tags for items with a Preset Net contain a series of numbers instead of the letter(s) denoting the Price Code. This series of numbers is the Preset Net to the consignor in coded form. $450.00 will appear as 100450001. Drop the 1's and leading 0's, place a decimal two places in from the right, imagine a dollar sign dancing in front of your (consignor's eyes in this case) and you have $450.00.*

Tag Qty

Enter the number of tags you want printed for this item. The default is 1. You may want more than one tag if an item, such as a suit, has more than one piece.

Item Fee

Use this field to enter an additional fee for the item. See the sec-

Copyright 2010, Resaleworld.com, Inc.

	tion on Price Code for information on Web Fees and Final Value Fees.
Allow Donate	If this box is checked than it can be donated. If it is not checked then the item can not be donated - an error message will appear in anyone attempts to donate the item in Post Sales. See also Define Default Information for Accounts and Additional Info for more information about defaults that control the donation of items.
Quantity (on Hand)	This field displays how many of this particular item are in stock. For instance liquidations are sometimes bought in quantity. This field is used only for items that are **Purchased**. This field is **disabled** for **Consigned** items.
Price Code*	The Price Code determines how the sale price of an item is split between the store and the client. It also controls automatic markdowns, items fees, and other factors that affect the sale of **One of a Kind** items.
Tax Code	The Tax Code defaults to the Tax Code assigned for each item's Category. See Categories Overview,Set up Tax Codes, and Set Up Product Lines, for more information. An item's Tax Code may be changed by selecting a Tax Code from the drop-down list.
Tag Color	Tag colors may be used for any reason. Two common reasons are: 1. Performing **Automatic Markdowns** based on tag color (see Set Up Automatic Markdowns by Tag Color for more information), and 2. Grouping inventory by tag color.
Store Section	Use this optional field to identify where the item is located on the store floor. Store Sections must be set up ahead of time.
Location	If you have multiple store locations, use this field to designate the current location of the item. To change the Location of an item, select **Activities** from the Main Menu, then select **Change Item Location**. The Change Item Location dialog will appear, allowing you to change both the Location and the **Store Section** for the item. See the section entitled Set Up Locations to add or edit Locations.
Custom 1-5	Use these fields to track additional data, such as a bin (box) number, etc.

The Custom 1 field appears in the Picklist, and HTML tags are available for all custom fields for use in the Templates which are used for Auction Ads. Other ways to use Custom fields include tracking information which is needed on a consistent basis, such as serial numbers, additional data to track items in a store or warehouse, etc.

Marketplace**

Use this field to select the web site where the item is to be posted for sale online. Marketplaces must be set up in advance. Please see the section entitled Set Ecommerce Marketplace Options and Ecommerce Brokers Set Up for more details.

***Important Note**: Do **not** enter a **Default Marketplace** unless an item is being sold online. Liberty reads the contents of the **Marketplace** field to determine if an item is being sold online or offline. All items sold online require auction information be entered before reaching a status of **Available**.*

*Any item entered with a **Marketplace** specified in the **Marketplace** field will have a status of **Needs Info** until all required **Auction Info** (shipping parameters, duration, reserve, photos, etc.) is entered. Entering this information is unnecessary, will require additional time, and as long as an item has a status of **Needs Info** it cannot be sold.*

Auction Account**

Choose the Auction Account to use for posting the item online. Auction Accounts are setup under **Tools** → **Ecommerce Options** → **Accounts**. An Auction Account default setting is available on the Account screen.

Sub-Title

Using a **Sub-Title** is an option when listing items for sale online. If you wish to use a Sub-Title, enter it here and then press <Enter>.

Duration**

Choose the length of the auction from the drop-down. Choose 99999 for items listed for sale in an online store in a non-auction environment.

Reserve

If you wish to set a Reserve for the item, enter the amount in the **Reserve** field. The Reserve price represents the LEAST amount that you are willing to accept for the item. If the auction finishes with no bid reaching the reserve, then the item is not sold.

Copyright 2010, Resaleworld.com, Inc.

For example, if an item's actual cost is $125.00 you may enter a reserve of $150.00 to cover the hard cost of the item, shipping, and a still return a small profit. A Reserve price can help prevent you from losing money on an auction.

Note that when you specify a Reserve eBay will charge a fee. Liberty will automatically charge this fee as long as the item's Price Code has a check-mark next to **Charge eBay Reserve Fee**. Once the item has successfully listed to eBay a **Reserve Price Fee** will appear in the consignor's account on the **Transactions** tab.

Starting Bid Enter the amount of the starting bid amount in the **Starting Bid** field. This is the minimum amount that the first bidder must bid. The starting bid may be set to 0.00.

When online items are entered it is necessary to specify a number of parameters in the Auction Detail tabs. These fields are described below. Note that the **Finish** tab will identify missing information, and items can only be uploaded to the auction web site once **all** necessary information has been provided.

Note that the **Save** button must be selected to store the information entered in the system.

One of a Kind Item Entry Window Fields - Auction Detail Tabs

Shipping Info Tab

Shipping Profile** Make the appropriate selection from the **Shipping Profile** drop-down. Liberty initially comes with two methods to choose from (more may be added under **Tools** → **Ecommerce Options** → **Shipping**):

1. **Flat Rate**. This requires you to set the S&H (shipping and handling) Fee in the following field. You may optionally enter an amount charged if the buyer purchases a second item simultaneously. This is accomplished in the **2nd Item Shipping** field.
2. **Calculated**. Selecting Calculated as the Shipping Type allows auction buyers to determine for themselves the amount of the shipping based on the zip code of the des-

Copyright 2010, Resaleworld.com, Inc.

tination to which the item will be shipped. Auction buyers accomplish this by clicking on the **Shipping Calculator** link in the **Auction Ad**.

Entering the shipping information when the item is listed allows eBay's Shipping Calculator to determine U.S. Postal Service and UPS shipping charges within the 50 United States based on the buyer's zip code.

When Calculated is selected as the Shipping Profile it is necessary to enter the Weight, Height, Length, Width, Handling Fee, and Package Type in the **Package Information** fields located below. This information is required in order for the Shipping Calculator to accurately determine the shipping cost.

While the shipping calculator supports most purchases on eBay, you should instruct Buyers to contact you when they:

- Want the item shipped outside of the United States,
- Wish to use a different shipping service than what's shown in the calculator (e.g. when they want UPS Next Day Air shipping but the shipping calculator shows rates for UPS Ground), or>
- When a buyer purchases multiple items which, when shipped together, should reduce shipping costs.

Note: *The default Handling Fee is specified on the* ***Tools → Ecommerce Options → Shipping Tab.***

S&H Fee The Shipping and Handling Fee. This field is only activated when a Shipping Profile with a Shipping Type of Flat Rate is selected. Please see the section entitled Set Up Ecommerce Shipping Options for more information about Shipping Profiles and Shipping Types.

2nd Item Shipping This field is only activated when a Shipping Profile with a Shipping Type of Flat Rate is selected. Amount charged for simultaneously shipping a second item. For instance, the shipping charge for a book might be $4.00 for the first book, $1.00 for the second, since two books may usually be shipping in one package.

Insurance Amount Enter the amount added for insurance in the **Insurance Amount**

Copyright 2010, Resaleworld.com, Inc.

	field. The **Insurance Type** field, which is located on the **Maintain Shipping Profiles** dialog (reached by selecting **Tools** → **Ecommerce Options** → **Shipping** and then selecting the **Edit** button) controls whether or not this field is active for a particular Shipping Profile. Please see the section entitled Set Up Ecommerce Shipping Options for more information about Shipping Profiles and Shipping Types.
Weight	This field is only activated when a Shipping Profile with a Shipping Type of Calculated Rate is selected. Enter the weight of the package. Please see the section entitled Set Up Ecommerce Shipping Options for more information about Shipping Profiles and Shipping Types.
Height, Length, and Width	Enter the Height, Length, and Width of the package. Upon doing so, the Girth of the package will be displayed to the right of the Width field. Girth is important as shippers such as UPS generally charge more for shipping packages whose Girth exceeds a certain amount. This field is only activated when a Shipping Profile with a Shipping Type of Calculated Rate is selected.
Handling Fee	Enter the additional fee, if any, to be charged for handling. A default Handling Fee may be specified on the **Tools** → **Ecommerce Options** → **Shipping** tab**.**
Package Type	This field is only used when the Shipping Type is Calculated. This field is not specified on this screen. It is instead a part of the Shipping Profile. Please see the section entitled Set Up Ecommerce Shipping Options for more information about Shipping Profiles and Shipping Types.
Help on Package Weight and Size	Click on this hyperlink for assistance in dealing with various package weights and sizes.
Sample Shipping Calculator	Click on this hyperlink to display the Shipping Calculator.

Photos Tab

Gallery Image(s)	Photos for auction items appear in the panels within the Gallery.
Load Photos	**Load Photos** looks to the default location for the images, as specified in Camera Directory field, which is located under **Tools** → **Ecommerce Options** on the **General** tab**.**
Load Photos From	Select this button to browse the computer system for the photo(s) to be loaded.
Enter image display size	Select the **Image Display Size** you wish the images to appear online by selecting one of the five Image Display Size's. Note that this selection is controlled by a default setting located under **Tools** → **Ecommerce Options** on the **General** tab.

Copyright 2010, Resaleworld.com, Inc.

Image Host	Select the **Image Host** where the images associated with the item will be stored online. This field has a default setting located under **Tools** → **Ecommerce Options** on the **Image Hosts** tab.
Clear Photos	Select to remove all photos from the Image Gallery.
Other Functions Available on this tab	**To Add a Single Photo to an Auction:** 1. Right click on any of the squares in the **Gallery Image** panel (located immediately below the **Photos** tab). A menu will appear. (Do not click on the border between each square – the menu will not appear if you do.) 2. Select **Load a Photo** from the menu that appears. 3. Navigate to the photo to load in the **Open** dialog that appears. 4. Highlight the photo file to load and select the **Open** button. **To Resize, Crop, Change Contrast And/Or Brightness, And/Or Rotate A Photo:** 1. double-click on the photo in the Photo Gallery (on the left side of the screen). The Image Preview dialog will appear in its actual size. 2. Make changes as desired. 3. Click **Save** when finished, or **Cancel** to abandon your changes. **To Remove a Single Photo from the Gallery:** 1. Right click on the photo to be removed. A menu will appear. (Do not click on the border between each square – the menu will not appear if you do.) 2. Select **Remove Image** from the menu that appears.

Auction Info Tab

Online Category and Category Value**	Use to select the eBay category for the item, or, if you know the **Category Value**, enter it in the Category Value field instead. Note that the online category is different then the Categories which you set up within Liberty. This is because eBay's categories constantly change and are designed for the benefit of

eBay and its users, whereas the Categories within Liberty are designed by you for your specific needs.

Note also that Liberty downloads eBay categories automatically so to keep them up to date within your system.

Attributes

If you select an Online Category which allows eBay **Item Specifics**, the **Attributes** button will be enabled. Click the Attributes button to set the Item Specifics for each auction.

Item Specifics are details that are specific to a Category. For example, rings would use gemstone as an Item Specific, Cars would use manufacturer, model, cylinders, etc.

> ***Note:*** *Liberty downloads eBay Item Specifics automatically to keep them up to date within your system.*

EBay Store

If you have set up an eBay store, you may assign a store category for this auction. Go to **Tools** → **Ecommerce Options** → **eBay Settings** to assign your store category names.

Store Only

Check this box to send the item to an eBay store. When this option is checked the item will not be uploaded to the eBay marketplace for auction.

Duration**

Choose the length of the auction from the drop-down. Choose 99999 for items listed for sale in an online store in a non-auction environment.

Starting Bid**

Enter the amount of the starting bid amount in the **Starting Bid** field. This is the minimum amount that the first bidder must bid. The starting bid may be set to 0.00.

Reserve

If you wish to set a Reserve for the item, enter the amount in the **Reserve** field. The Reserve price represents the LEAST amount that you are willing to accept for the item. If the auction finishes with no bid reaching the reserve, then the item is not sold.

For example, if an item's actual cost is $125.00 you may enter a reserve of $150.00 to cover the hard cost of the item, shipping, and a still return a small profit. A Reserve price can help prevent you from losing money on an auction.

Note that when you specify a Reserve eBay will charge a fee. Liberty will automatically charge this fee as long as the item'>s Price Code has a check-mark next to **Charge eBay Reserve Fee**. Once the item has successfully listed to eBay a **Reserve Price Fee** will appear in the consignor's account on the **Transactions** tab.

Copyright 2010, Resaleworld.com, Inc.

Auction Features

Click on the desired check boxes to select auction features that you wish to utilize in the auction. Available features include Bold-face Title, Home Page Featured, Featured Plus!, Highlight, 2nd Category, Buy It Now, and Use Counter. Please refer to the eBay web site for a detailed description of each feature.

> ***Note:*** *The cost next to each feature represents the fee you wish to charge the consignor's account: it is not the amount eBay charges. This allows you the flexibility to charge consignors whatever amount, if any, for these various features you see fit. To set these amounts, go to* ***Tools*** → ***Ecommerce Options*** *and select the* ***Marketplace*** *tab. See the section entitled Set Ecommerce Marketplace Options for more information.*

Gallery Options

Use this option to specify whether or not to include the item in the eBay Gallery. The Gallery is simply another way to promote your item within the auction. If you choose **Gallery** as an option for listing your auction, the first image (upper left on the Photo tab) will be designated as your gallery image.

As with the Auction Features the cost next to each option represents the fee you wish to charge the consignor's account, and not the amount eBay charges (see the note above).

To set these amounts, go to **Tools** → **Ecommerce Options** and select the **Marketplace** tab. See the section entitled Set Ecommerce Marketplace Options for more information.

HTML Template

Use the drop-down menu to select the **HTML Template** to use for the item. If you create customized templates and store them in the C:\RWD\AuctionTemplates directory, then the templates will appear in this drop-down menu.

For more information about creating **Auction Ads** with HTML Templates, please see the section in the manual entitled Auction Ads and HTML Templates.

Preview

Click the **Preview Button** to view the **Auction Ad** for the item. The Auction Ad will show on screen in your browser as it will appear to online shoppers using the same browser.

Finish Tab

Copyright 2010, Resaleworld.com, Inc.

The **Finish Tab** provides a summary of the auction, including a list of any required information that must still be supplied before the item can be put on auction by synchronizing with the broker and posting it online.

It is important to understand that **ALL** necessary parameters must be entered before an auction can be listed. As long as there are still one or more required parameters to be entered, the item will have a Status of **Not Ready**. When all necessary information has been entered the item's status will change to **Available**.

When all required information has been entered and the item has a status of **Available**, click on the **This item is ready to list** checkbox.

In the **Delay Listing Until (Date & Time)** fields, either leave the date and time as is, in which case the item will be uploaded with the next Synchronization, or change them so as to launch the auction later.

Related Topics

Add One of a Kind Items

Add an Account

Updating Auction Items

Definition of Consigned, Purchased, and Retail Items

Inventory Overview

Add Retail Items

Pricing Guide

ADD ONE OF A KIND ITEM

Inventory Module → *Task* → *Add Item*

Follow the steps outlined below to enter items that are any of the following:

Copyright 2010, Resaleworld.com, Inc.

- Consigned
- Purchased Outright from an individual (not a company)
- Trade

To enter items that are purchased from a company to be sold at retail, see Add Retail Items.

To process trade items, see Process Trade Items.

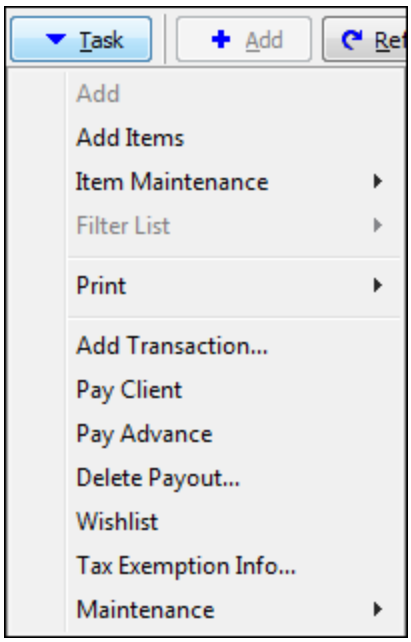
Before adding One of a Kind items, you must create an account for the client whose merchandise you plan to sell.

Editor's Note: for simplicity both Liberty for Consignment (aka L4C) and Liberty for Trading Assistants (L4TA) are referred to simply as **Liberty** in their respective manuals and online help files. Liberty for Consignment is designed for selling items in the store only: it does not contain the necessary functions to list and sell items online. To sell items online, please contact Resaleworld to purchase Liberty for Trading Assistants.

To Add One Of A Kind Items

1. Lookup the account you wish to add inventory to.
2. Select any of the following:
    a. Click on the **Add Item button**, which is located on the left side of the screen, or

    b. Click on the **Task button**, then select **Add Item**, or



c. Select the **2. Inventory** tab by either clicking on the tab or pressing <Alt> <2> and then click on the **Add** button.

3. The **Item Entry** window will display, and you will be in **Add Mode**. The cursor will be in the **Date** field.

4. Fill in all the required fields, and the optional fields as needed. Be sure to enter information on the Auction Detail tabs if necessary.

   Use the <Enter> key to move from field to field while on a particular screen: use the mouse only to move from tab to tab (e.g. to display the Auction Detail tabs). **As much as possible, don't use the mouse - it's much faster to keep your hands on the keyboard!** See How to Enter Items Faster for more information on how to enter inventory more efficiently and quickly.

5. Press the **<Enter>** key until the **Save** button is activated (look for a dashed line just inside its borders) Press **<Enter>** again. The item is saved, and the cursor will be positioned in the **Category** field.

6. Continue adding as many items as necessary. As you add the items will appear at the bottom of the screen in the **Grid**. Note that the Grid only shows the items you are currently adding. To see all items, go to the **2. Inventory** screen.

7. When finished adding items, click the **Stop** button.

8. Click the **Close** button to return to the Account window.

> ***Note:*** *The lower part of the Item Entry window displays a list of items entered. This is known as the Item Entry* ***Grid****. The Grid is empty when you first come*

Copyright 2010, Resaleworld.com, Inc.

into the Item Entry window. The Grid only displays those items entered while in the Item Entry display. When you exit the Item Entry window the Grid is emptied.

Related Topics

One of a Kind Item Entry Window

Updating Web Items

How to Enter Items Faster

Categories Overview

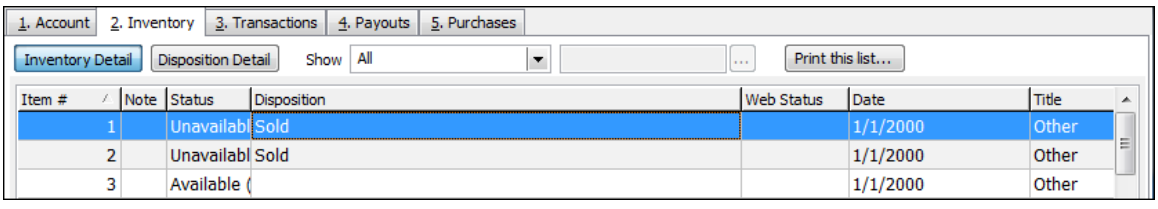
Definition of Consigned, Purchased, and Retail Items

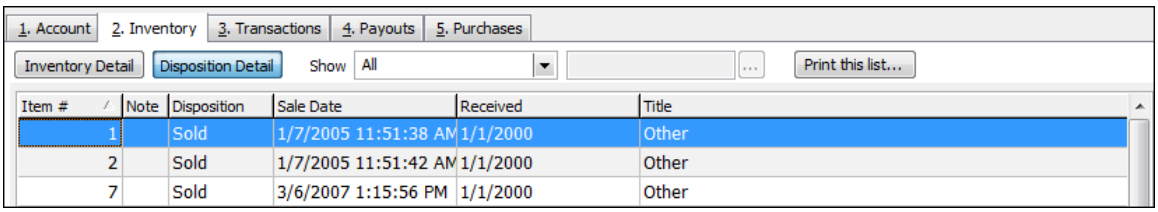
Pricing Guide

VIEW INVENTORY

Inventory Module ➔ *2. Inventory Tab*

You can learn many things about items, including their current status (available, sold, etc.), order status, description, price, etc. in the **Inventory** windows. Two windows show information - the **Inventory Detail** and **Disposition Detail** window.





The **Inventory Detail** display shows all information about an item. The **Disposition Detail** display shows a subset of the information contained in the Inventory Display. It is designed to make it easier to look at information about an item's Disposition.

A key field displayed in the Disposition Detail display is the **Disposition** field. **Disposition** is similar to **Status**, but whereas an item's Status is either Sold, Available, or Unavailable, an item's **Disposition** can be Sold, Sold Online, Donated, Returned, Expired, on Layaway, Being Sold, etc. An item's **Disposition** is more specific than an item's **Status**.

Both inventory windows default to showing all items, but can be set to display specific types of items by using **Filters**. For instance you can view just items sold, or just items sold and not paid, or just returned items, to name a few.

> ***Note:*** *There is a* ***Refresh*** *button near the top of the screen. It is sometimes necessary to select Refresh to update the Inventory window to show recently added or updated items.*

> ***Tip:*** *You can reorder and change the size of the fields listed in the Inventory window.*

To change the field order, click and drag the field labels (the header at the top of each column) to the left and right.

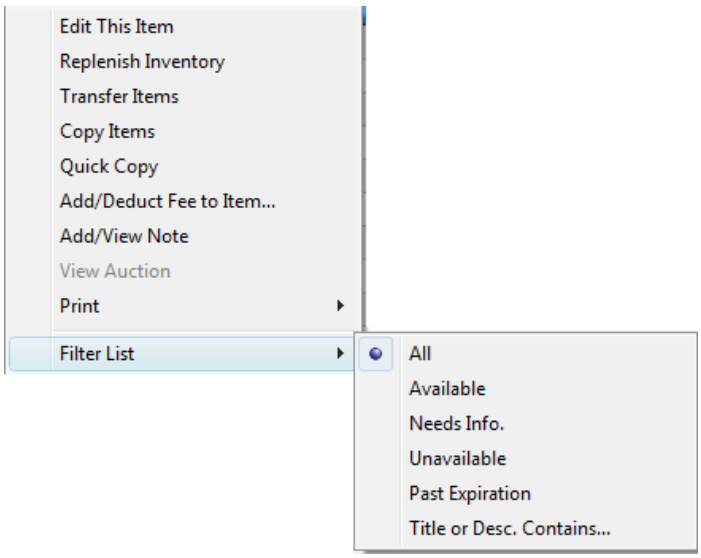
To change the size of a field, hold the mouse directly over the vertical line separating each field label. The mouse pointer will change to two vertical lines. Click and drag the field to resize it.

Note that the changes you make here are ***Sticky*** *- the software remembers what you did so you don't have to redo this process.*

To View Item Status Using the Inventory Window:

1. From the **2. Inventory** window, select **Task** ➔ **Filter List**, or

   Right-click anywhere over the item list area of the window (the area where the items are actually listed) and select **Filter List**.



2. Choose a **Filter** from the list provided. The Inventory Display will change to show just those items with the **Status** selected. The filter selected remains in effect until you change it or quit the program. When you quit the program the filter returns to **All**, which is the default filter.

Note: *Another way to filter items is to right click on any inventory item, then select* ***Filter List*** *from the menu that displays.*

To Print a Filtered Inventory List:

1. Select the appropriate filter as described above.
2. Select **Task** ➔ **Print Inventory Display**, or

Right-click anywhere over the item list area of the window (the area where the items are actually listed) and select **Print**.

Note*: The Contains filter searches only the Description field.*

Note*: The* ***To Return*** *filter lists all items that have passed their* ***Pickup Date****. See Define Consignment Splits for more information about setting* ***Pickup Dates****.*

To Add a Note to an Item:

1. From the **2. Inventory** window, right click on the item to which the note is to be added.
2. Select **Add/View Note**.

Copyright 2010, Resaleworld.com, Inc.

3. Enter the note, then click **OK**. A folder icon 🗁 will appear next to the item number.

(Follow steps 1 and 2 to view an existing note.)

Inventory Window Fields

Item Number	Assigned by the system. Each account starts at item number 1. The next item number can be changed by changing the number in the Next Item Number field on the Add'l Info screen.
Status	Current status of the item. Status types include Available, Needs Info, Sold, Donated, and Returned. The status **Needs Info** indicates the item is missing important information and cannot be sold until that information is entered. An item without a price, for example, would have a status of **Needs Info**.
Date	Date the item is entered into inventory.
Description	Free text description of the item from the Description field (not the Extended Description field)..
Title	A phrase created by Liberty that combines the Category 3, Brand, and Primary Attribute (see Categories Overview). The purpose is to create a consistent way to reference items. While Liberty automatically creates the **Title**, you may change it for any reason.
Price	Original asking price for the item.
Sale Date	Date and time item sold.
Net Due	The amount to be paid to a consignor for a sold item.
Price Sold	Actual selling price of the item.
Price Code	The Price Code of the item. Applicable only to One of a Kind items.
Payout	Payout number of check or cash statement for which the item was paid.
Item Fee	Use this field to enter an additional fee for the item. See the section on Price Code for information on Web Fees and Final Value Fees.
Cost/Net	This field is only filled in for one of a kind items, and shows one of two things:

Copyright 2010, Resaleworld.com, Inc.

	For items with a Status of Sold, it is the amount the consignor receives for the item. For items with a Status of Available, the amount in this field represents a **Preset Net**. See Add One of a Kind Items for more information about Preset Nets.
Quantity	Number of items.
Retail Price	The original retail price for the item. This price may be printed on the price tag.
Auction ID	The auction ID assigned to the item by the auction service.
Order Status	Examples of Order Status include Completed, Paid, Shipped, and Unpaid. Additional Order Statuses may be created in the Order Manager under **Tools → Maintain Order Status List**.

Related Topics

Item Entry Windows - Overview

View Item Disposition Using the Inventory Window

Filtering the Inventory Interface

Updating Auction Items

How to Enter Items Faster

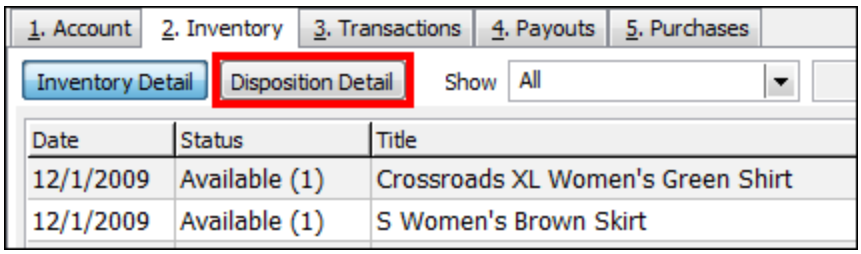
Add One of a Kind Items

Add Retail Items

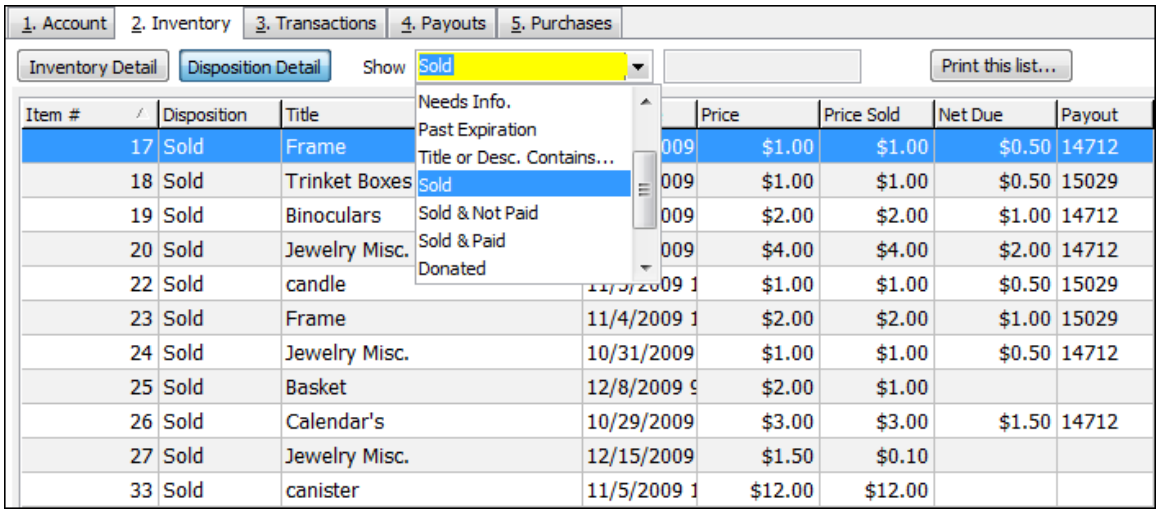
VIEW ITEM DISPOSITION USING THE INVENTORY WINDOW

Inventory Module → 2. Inventory Tab

1. Open the **Account Detail** screen.
2. Click the **2 - Inventory** tab.
3. Click the **Disposition Detail** button.



4. The Inventory is refreshed and the Disposition data is displayed.



5. Click the **Inventory Detail** button to change back to the original Inventory Detail view.

Related Topics

View Inventory

FILTERING THE INVENTORY INTERFACE

Inventory Module → 2. Inventory Tab

The Inventory tab on the Account Detail screen allows you to view all the inventory for this account. However, you can also filter the inventory that is displayed by selecting a specific status or disposition to use as criteria by using the Task > Filter List option. Once a criteria is selected, only inventory matching this criteria will display. If you select a specific Disposition from the list, the Disposition Detail view will automatically display.

The **Inventory Detail** display shows all information about an item. The **Disposition Detail** display shows a subset of the information contained in the Inventory Display. It is designed to make it easier to look at information about an item's Disposition.

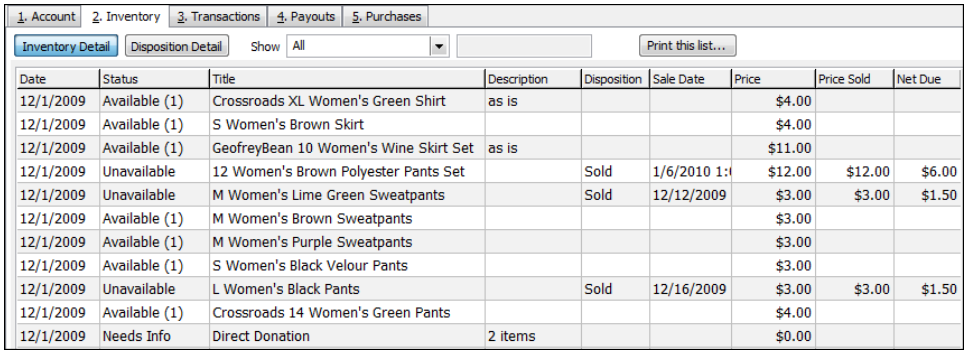
A key field displayed in the Disposition Detail display is the **Disposition** field. **Disposition** is similar to **Status**, but whereas an item's Status is either Sold, Available, or Unavailable, an item's **Disposition** can be Sold, Sold Online, Donated, Returned, Expired, on Layaway, Being Sold, etc. An item's **Disposition** is more specific than an item's **Status**.

To View Items Based on Status

1. From the **2. Inventory** window, select **Task → Filter List → Inventory Detail**, OR

   Use the **Show** drop-down list to choose a Status to filter by OR

   Right-click anywhere over the item list area of the window (the area where the items are actually listed) and select **Filter List**.

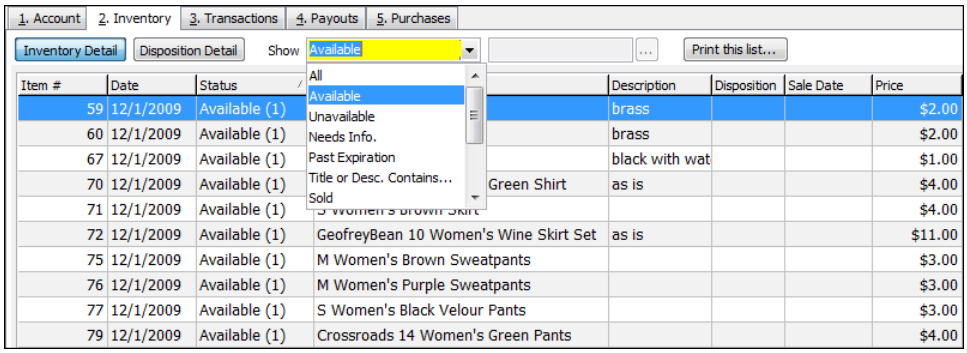


Date	Status	Title	Description	Disposition	Sale Date	Price	Price Sold	Net Due
12/1/2009	Available (1)	Crossroads XL Women's Green Shirt	as is			$4.00		
12/1/2009	Available (1)	S Women's Brown Skirt				$4.00		
12/1/2009	Available (1)	GeofreyBean 10 Women's Wine Skirt Set	as is			$11.00		
12/1/2009	Unavailable	12 Women's Brown Polyester Pants Set		Sold	1/6/2010 1:	$12.00	$12.00	$6.00
12/1/2009	Unavailable	M Women's Lime Green Sweatpants		Sold	12/12/2009	$3.00	$3.00	$1.50
12/1/2009	Available (1)	M Women's Brown Sweatpants				$3.00		
12/1/2009	Available (1)	M Women's Purple Sweatpants				$3.00		
12/1/2009	Available (1)	S Women's Black Velour Pants				$3.00		
12/1/2009	Unavailable	L Women's Black Pants		Sold	12/16/2009	$3.00	$3.00	$1.50
12/1/2009	Available (1)	Crossroads 14 Women's Green Pants				$4.00		
12/1/2009	Needs Info	Direct Donation	2 items			$0.00		

2. Choose a **Filter** from the list provided. The Inventory Display will change to show just those items with the **Status** selected, such as all items with a Status of "Available" as seen

Copyright 2010, Resaleworld.com, Inc.

in this example:



3. The filter selected remains in effect until you change it or quit the program. When you quit the program the filter returns to **All**, which is the default filter.

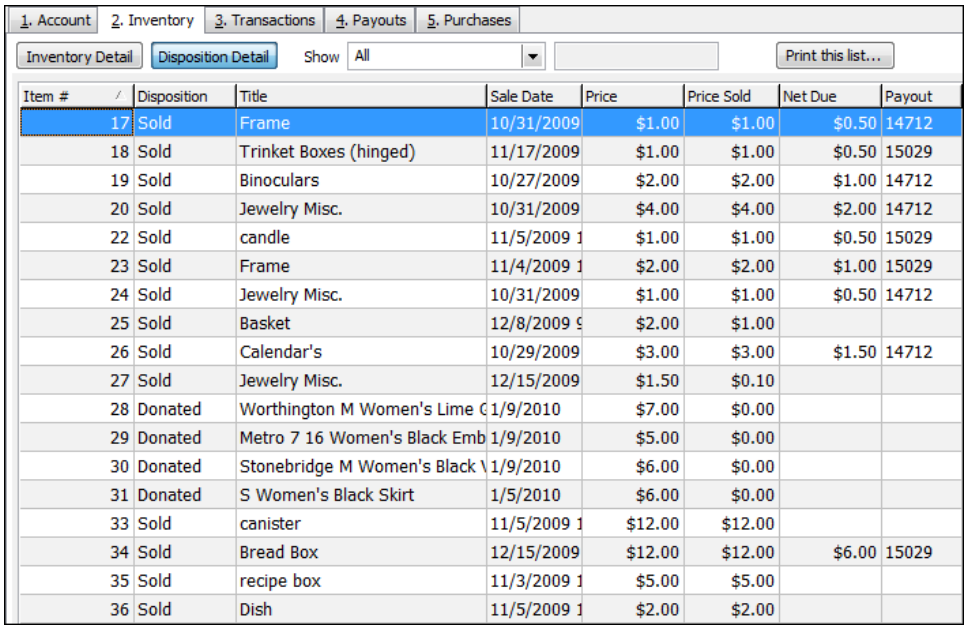
To View Items Based on Disposition

1. From the **2. Inventory** window, select **Task** ➔ **Filter List** ➔ **Disposition Detail**, OR

   Use the **Show** drop-down list to choose a Disposition to filter by OR

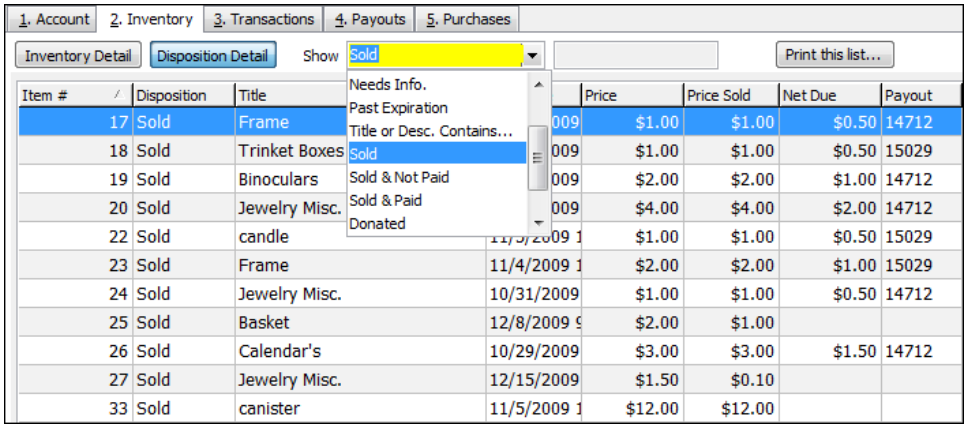
   Right-click anywhere over the item list area of the window (the area where the items are actually listed) and select **Filter List**.

   Please note that you must be in the **Disposition Detail** view for the Disposition criteria to display using this method.


1. Account
2. Inventory
3. Transactions
4. Payouts
5. Purchases
Inventory Detail
Disposition Detail
Show
All
Print this list...
Item #
Disposition
Title
Sale Date
Price
Price Sold
Net Due
Payout
17 Sold Frame 10/31/2009 $1.00 $1.00 $0.50 14712
18 Sold Trinket Boxes (hinged) 11/17/2009 $1.00 $1.00 $0.50 15029
19 Sold Binoculars 10/27/2009 $2.00 $2.00 $1.00 14712
20 Sold Jewelry Misc. 10/31/2009 $4.00 $4.00 $2.00 14712
22 Sold candle 11/5/2009 1 $1.00 $1.00 $0.50 15029
23 Sold Frame 11/4/2009 1 $2.00 $2.00 $1.00 15029
24 Sold Jewelry Misc. 10/31/2009 $1.00 $1.00 $0.50 14712
25 Sold Basket 12/8/2009 9 $2.00 $1.00
26 Sold Calendar's 10/29/2009 $3.00 $3.00 $1.50 14712
27 Sold Jewelry Misc. 12/15/2009 $1.50 $0.10
28 Donated Worthington M Women's Lime C 1/9/2010 $7.00 $0.00
29 Donated Metro 7 16 Women's Black Emb 1/9/2010 $5.00 $0.00
30 Donated Stonebridge M Women's Black \ 1/9/2010 $6.00 $0.00
31 Donated S Women's Black Skirt 1/5/2010 $6.00 $0.00
33 Sold canister 11/5/2009 1 $12.00 $12.00
34 Sold Bread Box 12/15/2009 $12.00 $12.00 $6.00 15029
35 Sold recipe box 11/3/2009 1 $5.00 $5.00
36 Sold Dish 11/5/2009 1 $2.00 $2.00

2. Choose a **Filter** from the list provided. The Disposition Detail will change to show just

those items with the selected Disposition, such as all items with a Disposition of "Sold" as seen in this example:


1. Account
2. Inventory
3. Transactions
4. Payouts
5. Purchases
Inventory Detail
Disposition Detail
Show
Sold
Needs Info.
Past Expiration
Title or Desc. Contains...
Sold
Sold & Not Paid
Sold & Paid
Donated
Print this list...
Item # | Disposition | Title | Price | Price Sold | Net Due | Payout
17 | Sold | Frame | $1.00 | $1.00 | $0.50 | 14712
18 | Sold | Trinket Boxes | $1.00 | $1.00 | $0.50 | 15029
19 | Sold | Binoculars | $2.00 | $2.00 | $1.00 | 14712
20 | Sold | Jewelry Misc. | $4.00 | $4.00 | $2.00 | 14712
22 | Sold | candle | $1.00 | $1.00 | $0.50 | 15029
23 | Sold | Frame | 11/4/2009 | $2.00 | $2.00 | $1.00 | 15029
24 | Sold | Jewelry Misc. | 10/31/2009 | $1.00 | $1.00 | $0.50 | 14712
25 | Sold | Basket | 12/8/2009 | $2.00 | $1.00
26 | Sold | Calendar's | 10/29/2009 | $3.00 | $3.00 | $1.50 | 14712
27 | Sold | Jewelry Misc. | 12/15/2009 | $1.50 | $0.10
33 | Sold | canister | 11/5/2009 | $12.00 | $12.00

3. The filter selected remains in effect until you change it or quit the program. When you quit the program the filter returns to **All**, which is the default filter.

Related Topics

View Inventory

EDIT AN ITEM

Inventory Module → *Task* → *Item Maintenance* → *Edit Item or Auction Items Button*

Use one of these two procedures to make changes to items in Liberty. Most find the Auction Items screens to be the most effective method.

To Edit an Item

1. From the main menu, click on the **Accounts** button.
2. Double-click on the client's account that has the item that needs to be changed.
3. Click on the **Inventory** tab.
4. Double-click the item to be changed, or

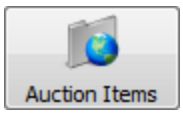
Right-click on the item and select **Edit This Item** from the menu, or Select **Task** ➔ **Item Maintenance** ➔ **Edit Item**. The **Item Entry** window will appear, with the selected item displayed.

5. Make the necessary changes.
6. Select the **Save** button when finished.
7. Select **Close** to exit the Item Entry window.

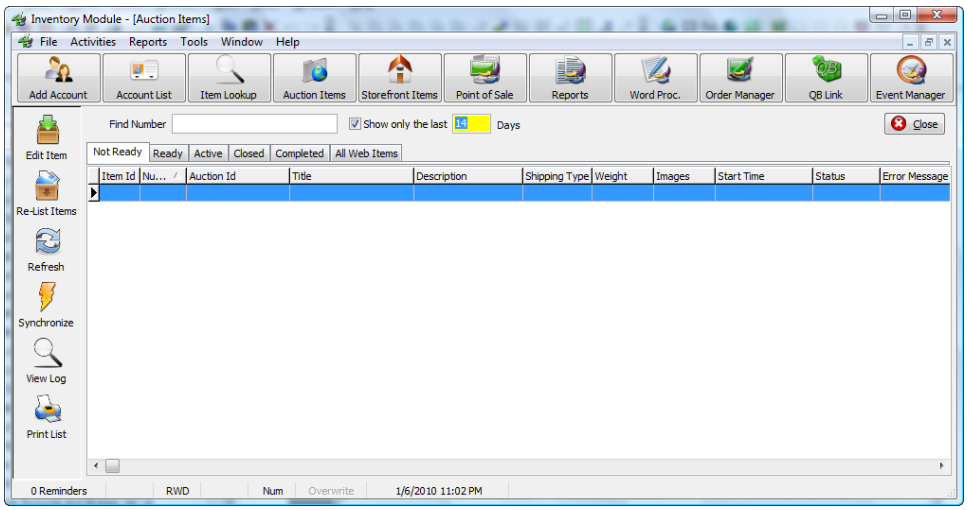
***Tip**: When entering items, right clicking on any item displayed in the Item Grid (at the bottom of the screen) will display a menu with various options, including Edit, Delete, and Copy.*

Edit an Item Using Auction Items

1. Click on the **AuctionItems** button at the top of the screen. It is located just under the Main Menu.



The Auction Items lookup screen will display:



2. Locate the item to be edited. The **Find Number** lookup at the top will assist in this effort when there are many items to look among. If you have difficulty finding the item, try the following:

- There are six different **Status** tabs – Not Ready, Ready, Active, Closed, Completed, or All Auction Items. Accordingly, check to see the correct **Status** tab is selected.
- Be sure the number of days listed in the **Show only the last __ Days** filter has a number entered that will allow the item to show. Changing the number of days or removing the check from the check box may be required.

3. Edit the item as needed, then click the **Save** button.

Note: *The layout of the Auction Items screens and location of fields is somewhat different then the Item Entry screen. The Auction Items screens are optimized for editing items after part of the item information has been entered, as opposed to entering information initially.*

Related Topics

Add One of a Kind Items

View Inventory

Edit Retail Items

COPY AN ITEM

Inventory Module → 2. Inventory → Task → Item Maintenance → Copy Item & Quick Copy

You can copy an item in an account once or many times with a simple procedure. If you have 12 Waterford crystal glasses to be sold separately, you can enter one glass and then easily copy it.

To Copy the Last Item Entered Once

1. Highlight the item you wish to copy in the **2. Inventory** window.
2. Click on the **Task** button.
3. Select **Item Maintenance → Quick Copy**.

Copyright 2010, Resaleworld.com, Inc.

OR

1. Add an item in the Item Entry window, then
2. Without clicking Stop, select **Task** → **Quick Copy Last Item**.

To Copy an Item Multiple Times

1. Highlight the item you wish to copy in the **2. Inventory** window.
2. Click on the **Task** button.
3. Select Item **Maintenance** → **Copy Item**.
4. Enter the number of duplicates in the **Copy Items** dialog. (Remember, if you want a total of ten, you already have one entered, so enter **9**, not **10**.)

OR

1. In the **Item Entry** window, add the item that will be copied.
2. Without clicking Stop, select **Task** → **Copy Item**.
3. Enter the number of duplicates in the **Copy Items** dialog. (Remember, if you want a total of ten, you already have one entered, so enter **9**, not **10**.).

Related Topics

Add One of a Kind Items

Copy Retail Items

DELETE A ONE OF A KIND ITEM

Inventory Module → *Item Entry Grid*

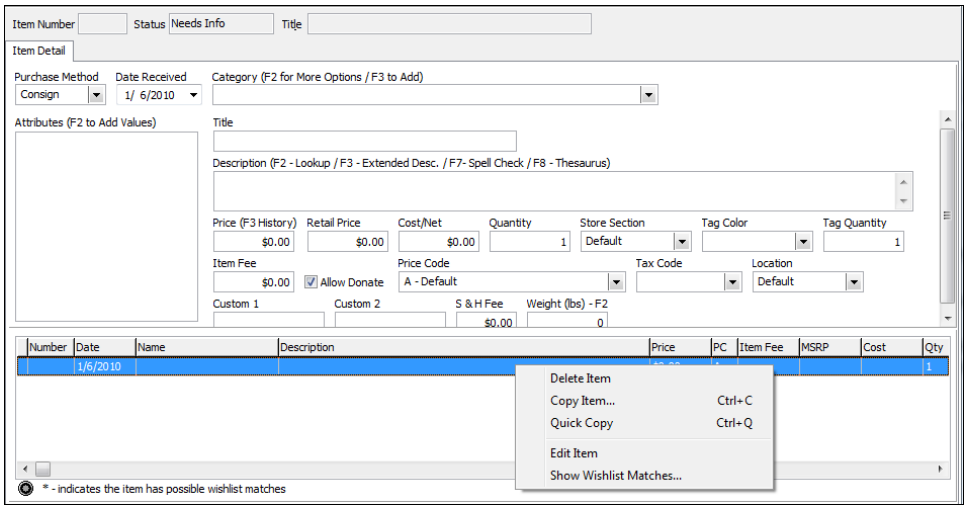
To maintain data integrity, an item may only be deleted so long as it still appears at the bottom of the Item Entry display. **Once an item has been added and the Item Entry screen is closed**

Copyright 2010, Resaleworld.com, Inc.

the item cannot be deleted. It may, however, be **voided** as long as it has a status of Available – see below for details.

To Delete an Item

1. While still in the Item Entry screen (before clicking on the **Close** button to leave the screen), look for the item to be deleted in the Item Entry Grid. The Item Entry Grid is located in the bottom half of the Item Entry Window.



2. Right-click in the grid on the item to be deleted.
3. Select **Delete Item** from the menu that displays.

To Void an Item

1. Lookup the account containing the item.
2. Select the **2. Inventory** tab.
3. Highlight the item.
4. Click on the **Void Item** button, located on the left side of the screen.

The item will no longer show in the Inventory list.

Following are two additional techniques for handling items you wish to remove from an account but are unable to delete using the steps above.

1. Replace all the information for the item to be deleted - description, price, title, etc. - with another item.
2. Create a junk account and transfer items into it. Be sure to assign the account a very high account number, such as 999990, so that items in this account may be easily excluded from reports by filtering the account number range to (for example) 000001 - 999989.

Related Topics

Add One of a Kind Items

View Inventory

Delete Retail Items

TRANSFER ITEMS TO ANOTHER ACCOUNT

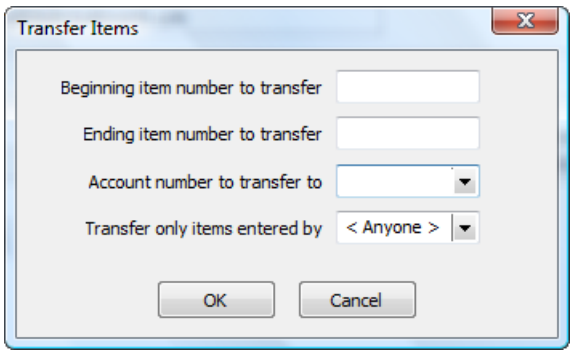
Inventory Module → *Task* → *Item Maintenance* → *Transfer Items*

Once in a while items are accidentally entered into the wrong account. Rather than delete the items and then re-enter them in the correct account, use the Transfer routine. Before using the Transfer routine, please note the following:

- Do not transfer items once they have been tagged and put out on the floor. Doing so will result in the account number and item number on the tags not matching the information in Liberty. The result: corrupted files, shortened tempers, and serious headaches!
- Consigned items for which the consignor has been paid cannot be transferred.

To Transfer Items From One Account To Another:

1. Lookup the account with the items to be transferred.
2. Select **Task** → **Item Maintenance** → **Transfer Items**. The **Transfer Items** dialogue displays:



3. Enter the range of item numbers to transfer in the beginning item number and ending item number fields.
4. Enter the account number to transfer the items to. (Click on the button with three dots for a lookup window.)
5. Use the Transfer only drop-down to only transfer items entered by a specific user.
6. Select the **Transfer** button.

Related Topics

Delete an Item

PROCESS TRADE ITEMS

Inventory Module → *Task* → *Process Trade Item*

About Trade Items

Trade items are items that have been entered in and which allow for the account to be credited in one of two ways – Cash Value or Trade Value.

The **Cash Value** for a trade item is either the Cost entered during Item Entry, or if Cost is left as $0, it is calculated based on the Client % set for the Price Code used for the item.

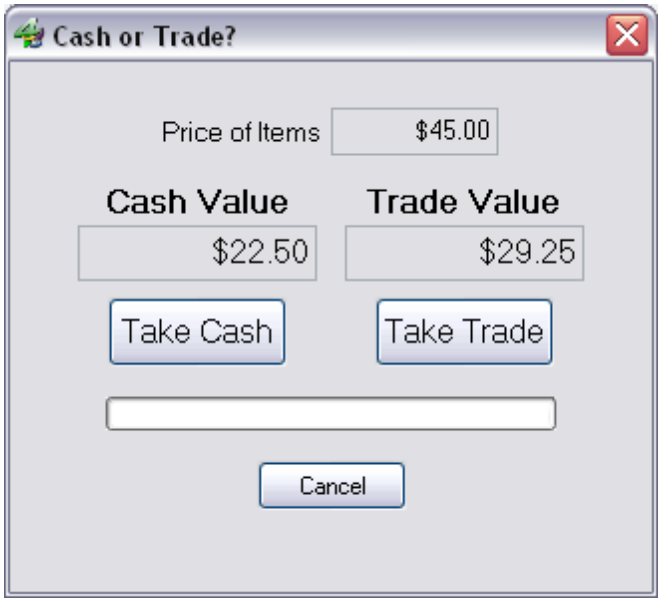
The **Trade Value** is a calculated value that is based on the Cash Value, the Price of the item, and the Differential Percentage for Trade Items that is set in **Account Options**. The calculation

takes the Cash Value's percentage of the Price, then increases that percentage by the Differential Percentage for Trade Items, then uses that new percentage to calculate the Trade Value.

Prior to processing trade items, an Item List – Trade Value report may be run from the **Print Item List** button. This report will show the Cash Value, Trade Value, and difference between the two for each trade item in the account, along with totals.

To Process Trade Items

1. Lookup the account with the items to be transferred.
2. Select **Task** → **Process Trade Items...** The **Process Trade Items** dialogue displays:



3. Select either **Take Cash** or **Take Trade** to complete processing. The items will be set to be **Purchase Items** at that point, and the Cost will be updated accordingly, based on the selected value.
4. A payout can now be processed if **Take Cash** is chosen. Otherwise, the credit is now available to be used in Point of Sale.

Copyright 2010, Resaleworld.com, Inc.

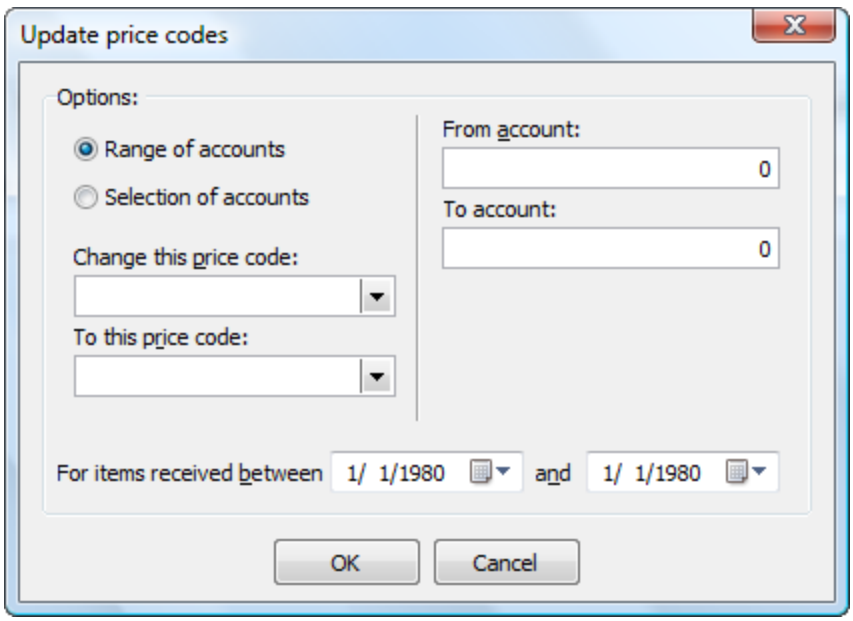
CHANGE PRICE CODES FOR A GROUP OF ITEMS

Activities ➔ *Inventory* ➔ *Change Item Price Codes*

On occasion it is necessary or desirable to change the Price Code for a number of items. An example of when this routine is useful would be when a group of items are assigned the wrong Price Code and the error needs to be rectified.

To Change The Price Code For Multiple Items Simultaneously

1. This is a powerful routine, so start by performing a backup in case a mistake is made.
2. Select **Activities** ➔ **Inventory** ➔ **Change Item Price Codes**. The **Update Price Codes** dialog will display:



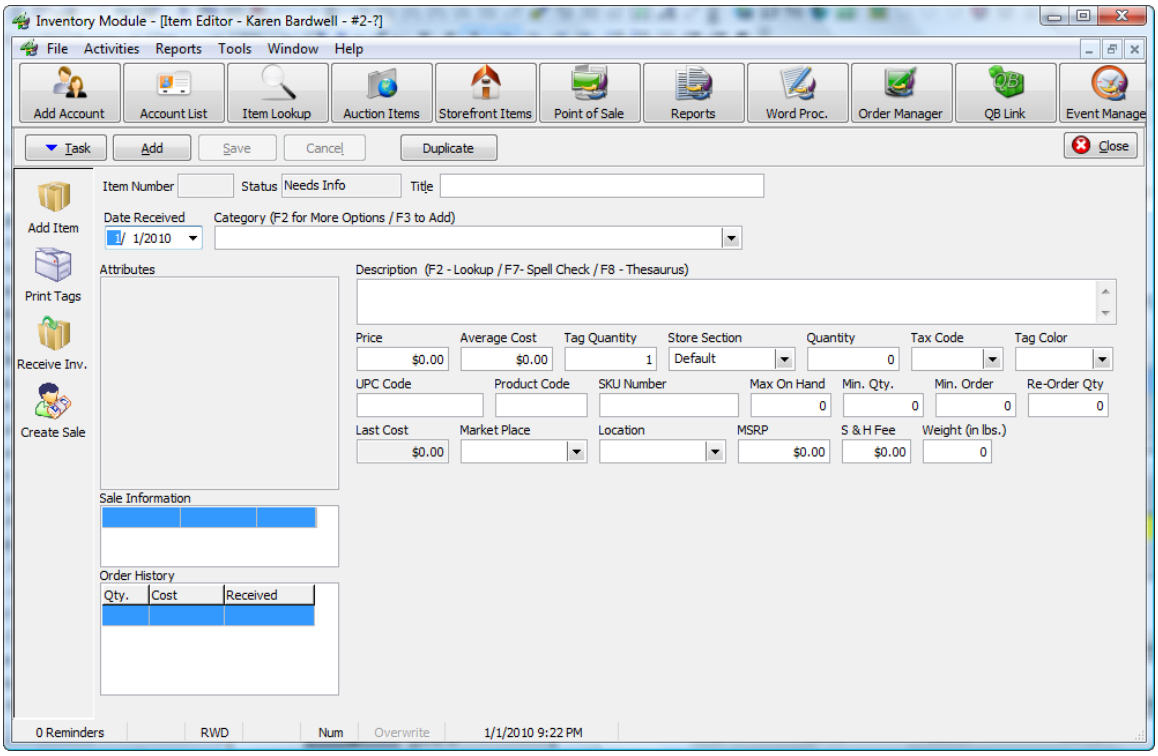
3. Select whether to change Price Codes either by specifying a **Range of Accounts** or **Select (Specific) Accounts**.
4. Select the Price Code to be changed in the **Price Code to be Changed** drop-down.
5. Select the new Price Code to be assigned in the **To This Price Code** drop-down.

Copyright 2010, Resaleworld.com, Inc.

6. If **Range of Accounts** was selected in step 3 above, enter the range in the **From Account and To Account** fields. If **Selection of Accounts** was selected in step 3 above, enter the accounts one at a time (followed by pressing the <Enter> key) in the **Enter Accounts** field.
7. Enter the time frame the items must have been entered in the **For items received between** fields.
8. Select the **OK** button.

RETAIL ITEM ENTRY WINDOW

Inventory Module ➔ *Task* ➔ *Add Item*



The **Retail Item Entry** window's fields are described below. Fields marked with an asterisk * are required. Fields marked by a **…** are assigned by Liberty and cannot be changed by the user.

***Notes**: The **Save** button must be selected to save information.*

*If a field described below does not appear on screen, it may be a **Hidden** field. To show a hidden field, select **Task** → **Edit Layout**. The Edit Layout dialog will appear. Hidden fields will appear in gray. To **Show** a field, highlight the field then click the **Show** button. For more information about Editing Layouts, see the section entitled Set Item Entry Field Preferences.*

Retail Item Entry Window Fields

Item Number… Assigned by the system. Each account starts at item number 1. The next item number can be changed by changing the number in the Next Item Number field on the Add'l Info screen.

Status… Current status of the item. Status types include Available, Needs Info, Sold, Donated, Returned, and Being Sold.

The status **Needs Info** indicates the item is missing important information and cannot be sold until that information is entered. An item without a price, for example, would have a status of **Needs Info**.

An item with the status **Being Sold** is at that very moment part of an unfinished Point of Sale transaction, or is part of a suspended sale.

Title… A phrase created by Liberty combining selected fields, most often the Attribute Types, Brand, and Level 3 Category fields. The default syntax is: {Attribute(s) + Brand + Level 3 Category}

Examples:
Peach Size 10 Ann Taylor Blouse
Oak 60 inch Taylor Table

The purpose is to provide items listed online with an Item Title, and to create a consistent way to reference items within Liberty. In addition to appearing in the Auction Ads and HTML Templates, Titles are used in the Item Lookup, Wish List, and certain reports.

While Liberty automatically creates the **Title**, you may change it for any reason here in the Item Entry screen.

In addition, the **Maintain Category Attributes** dialog provides the ability to select which Attributes are, and which are not, included in the Title. Please see the sections entitled Overview of Attributes and Show Attributes in Item Titles for more information.

Copyright 2010, Resaleworld.com, Inc.

> ***Note**: When an item is edited after it has been saved, the Title must be manually changed. This is because the Title does not automatically update.*

Date Received* Date the item is entered into inventory. Liberty defaults to the system date. Change the date if necessary by typing in a new date or clicking on the 6 and selecting the date from the calendar that appears.

> ***Note:** When the date is changed the new date will carry forward to subsequently entered items.*

Category* Select the **Level 3 Category** that best describes this item.

To save time and keystrokes Liberty will auto fill the Category field as you type in the Category field.

Alternatively, press **F2** and the Select Category dialog will appear, from which you may use the mouse or a combination of letters and arrow keys to choose a Category.

Please see Categories Overview for more information.

Attributes & Attribute Panel Select the appropriate attributes for this item. The first attribute listed is known as the **Primary Attribute**.

To help save time entering items, all Attributes make use of auto fill.

Which Attribute(s) appear in the Attribute Panel depends on the Category selected for the item. Specific Attributes may be assigned to specific Categories. See Categories Overview and Set up Attributes for more information.

Copyright 2010, Resaleworld.com, Inc.

Description Describe the item as much or as little as you wish.

Pressing the **F2** key while in the Description field will bring up the Item Description popup. See Set Up Item Descriptions for more information.

Pressing **F7** will bring up the spell checker. See Set Up Spell Checking for Item Descriptions for more information.

Price* Enter the price you set to sell the item in your store at, and that you wish to appear on the price tag.

> ***Note:*** *When selling online items, this is your base price and does not include any fees.*

Average Cost… This field shows the average cost of the currently displayed item. This field may be changed, however, it is recommended that you do not change the value in this field.

Tag Qty Enter the number of tags you want printed for this item. The default is 1.

Store Section Use this optional field to identify where the item is located on the store floor. Store Sections must be set up ahead of time.

Quantity This field is not editable in the Retail Item window. See Add Retail Items to Inventory for information.

Tax Code The Tax Code defaults to the Tax Code assigned for each item's Category. See Categories Overview,Set up Tax Codes, and Set Up Product Lines, for more information.

An item's Tax Code may be changed by selecting a Tax Code from the drop-down list.

Tag Color Tag colors may be used for any reason. Two common reasons are:

1. Performing **Automatic Markdowns** based on tag color (see Set Up Automatic Markdowns by Tag Color for more information), and
2. Grouping inventory by tag color.

UPC (Universal Product Code) Enter the item's UPC (Universal Product Code) in this field. Do this by either:

Copyright 2010, Resaleworld.com, Inc.

1. Scanning the UPC with the bar code reader (while the cursor is in the UPC field), or
2. Typing the UPC into the field.

UPCs are 13 characters in length. If the UPC entered is 13 characters in length then UPCs scanned at Point of Sale will add the item to the sale. If the UPC is not 13 characters then Point of Sale will not recognize the entry.

> ***Note**: Every item has a unique UPC number, and UPCs are controlled and assigned by a national organization.*

Product Code Enter the item's Product Code in this field. Product Codes are generally assigned by the manufacturer of the item.

SKU Number Enter the item's SKU (stock keeping unit) number in this field. Stores usually generate and assign their own SKU's.

Max on Hand Specify the maximum number of the item you wish to have on hand at any one point in time. This field is used for reference and reporting purposes.

Min. Qty. Specify the minimum number of the item you wish to have on hand at any one point in time. This field is used for reference and reporting purposes.

Min. Order Specify the minimum order required by the manufacturer/distributor for this item. This field is used for reference and reporting purposes.

Re-Order Qty. Specify the quantity level at which orders should be placed. This field is used for reference and reporting purposes.

Last Cost… This field shows the cost paid for the item in the most recent order. This field is not editable.

Website Use this field to select the web site where the item is to be posted. Marketplaces must be set up in advance. Please see the section entitled Set Ecommerce Marketplace Options and Ecommerce Brokers Set Up for more details.

Important Note: The Auction Detail tab, which contains the fields required to successfully list items for auction online, will not appear until a Marketplace is selected.

Copyright 2010, Resaleworld.com, Inc.

Location	If you have multiple store locations, use this field to designate the current location of the item. To change the Location of an item, select **Activities** from the Main Menu, then select **Change Item Location**. The Change Item Location dialog will appear, allowing you to change both the Location and the **Store Section** for the item. See the section entitled Set Up Locations to add or edit Locations.

Related Topics

Add Retail Items

Inventory Overview

Updating Web_Items

Add One of a Kind Items

Add an Account

Definition of Consigned, Purchased, and Retail Items

ADD RETAIL ITEMS

Inventory Module ➔ *Task* ➔ *Add Item*

Follow the steps outlined below to enter items purchased from a retail vendor. Bear in mind that before adding Retail items, you must create an account for the vendor whose merchandise you plan to sell.

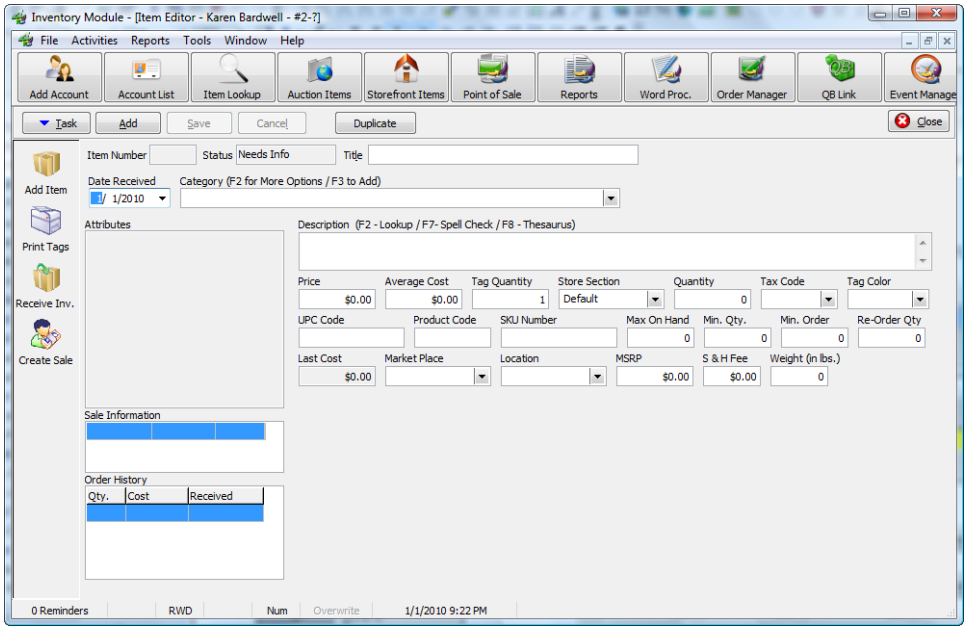
Copyright 2010, Resaleworld.com, Inc.

To Add Retail Items

1. Lookup the **Retail Account** you wish to add inventory to. For the account to be a Retail Account, the **Account Type** must be **Retail Vendor**.

2. Select **Task** ➔ **Add Item**, or

   Select the **Add Item** button on the left side of the screen. The **Retail Item Entry** window will display, and you will be in **Add** mode. The cursor will be in the **Date** field.



3. Fill in all the required fields and the optional fields as needed. See the section entitled Retail Item Entry Window for definitions of the fields in this window.

   Note: *Do not enter a quantity at this time. Quantities are adjusted when receiving inventory.*

4. Press the <Enter> key until the **Save** button is activated (look for a dashed line just inside its borders). Press <Enter> again to save the item.

5. When finished adding items, click the **Stop** button.

6. Click the **Close** button to exit the Retail Item Entry Window.

7. The next step is to Receive Inventory. See the section entitled Receive Retail Inventory for details.

Note: *The Retail Item window does not contain an Item Entry Grid. To view Retail Items, go to the 2. Inventory tab.*

Related Topics

Receive Retail Inventory

The Retail Item Entry Window

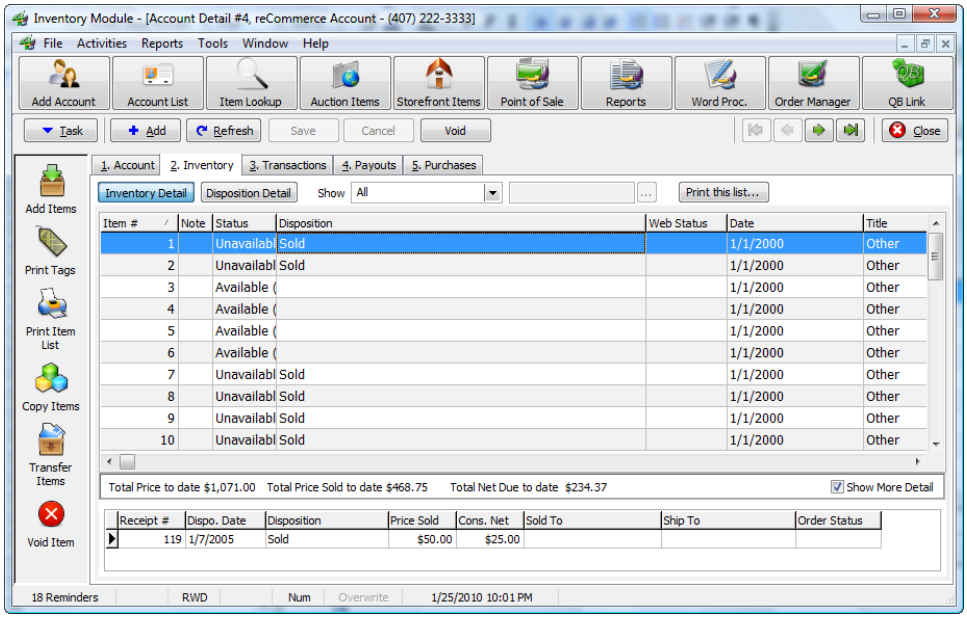
How to Enter Items Faster

VIEW RETAIL ITEMS

Inventory Module ➔ *2. Inventory Tab*

To View Items Obtained From A Particular Retail Vendor:

1. Lookup the Retail Vendor account.
2. Select the **2. Inventory** tab.



Related Topics

View Inventory

Item Entry Windows - Overview

How to Enter Items Faster

Add One of a Kind Items

Add Retail Items

EDIT RETAIL ITEMS

Inventory Module → 2. Inventory → Retail Items Window

To Make Changes To Retail Items

1. Double-click on the item in the Inventory window. The **Retail Item Entry** window will display.
2. Make changes to the item as necessary.
3. Select the **Save** button when finished.

Related Topics

Edit an Item

View Retail Items

RECEIVE RETAIL INVENTORY

Inventory Module → Retail Item Window → Task → Receive Inventory

When a Retail Item is first added, its **Quantity on Hand** is zero (0). To increase the quantity to 1 or more, use the Receive Inventory routine.

To Set The Inventory Level Immediately After Adding The Item:

1. Immediately after saving the item, select **Task** → **Receive Inventory**.
2. Enter the number of items received in the **Quantity Received** field.
3. Enter the cost per item in the **Cost** field.
4. Change the date the items were received if necessary.
5. Enter the date the items were ordered in the **Date Ordered** field.
6. Change the amount in the **Update Tag count to** field if necessary.
7. Select **OK** when finished.

To Receive Subsequent Retail Inventory:

1. Lookup the Retail Vendor Account for which you have received inventory.
2. Select the **2. Inventory** tab.
3. Highlight the item for which inventory was received. Select **Task** → **Item Maintenance** → **Receive Inventory**, or

   Double-click the highlighted item, then select **Task** → **Receive Inventory**.
4. Enter the number of items received in the **Quantity Received** field.
5. Enter the cost per item in the **Cost** field.
6. Change the date the items were received if necessary.
7. Enter the date the items were ordered in the **Date Ordered** field.
8. Change the amount in the **Update Tag count to** field if necessary.
9. Select **OK**. A dialog will display asking if you wish to update the average cost for the item. Select Yes, and you are then finished.

Related Topics

Retail Item Entry Window

Add Retail Items

Copyright 2010, Resaleworld.com, Inc.

Enter Sale Dates for Retail Items

Reduce the Quantity on Hand of a Retail Item

Inventory Module → Retail Item Window → Task → Receive Inventory

Sometimes it is necessary to reduce the number items in stock for retail items. For example:

- To correct a mistake made when receiving inventory.
- To adjust the Quantity on Hand due to shrinkage.

To Reduce the Quantity On Hand for a Retail Item:

1. Lookup the Retail Vendor Account.
2. Select the **2. Inventory** tab.
3. Highlight the item for which the inventory level must be adjusted. Select **Task → Item Maintenance → Receive Inventory**, or

   Double-click the highlighted item, then select **Task → Receive Inventory**.
4. Enter a **negative** number of items received in the **Quantity Received** field. Do this by clicking on the **downward pointing triangle** located at the right of the Quantity Received field.
5. If appropriate and/or possible, enter the cost per item in the **Cost** field.
6. Change the date the items were (not) received if necessary.
7. Enter the date the items were (not) ordered in the **Date Ordered** field.
8. Change the amount in the **Update Tag count to** field if necessary.
9. Select **OK**. A dialog will display asking if you wish to update the average cost for the

Copyright 2010, Resaleworld.com, Inc.

item. Select Yes, and you are then finished. (The quantity level will be adjusted accordingly.)

Related Topics

Retail Item Entry Window

Add Retail Items

Enter Sale Dates for Retail Items

ENTER SALE DATES FOR RETAIL ITEMS

Inventory Module → *Retail Item Window* → *Task* → *Create New Sale*

Items may be posted as sold at a discount by using Sale Post in Point of Sale. With Retail Items it is possible to put items on sale for a specific time period. Doing so causes the items to be rung up in Point of Sale during the specified time period at the lower sale price automatically.

To Specify a Sale Price and Sale Period for Retail Items:

1. Double-click on the item in the Inventory window, or
   Highlight the item in the Inventory window, then select **Task** → **Item Maintenance** → **Edit Item**, or
   Right click on the item in the Inventory window, then select **Edit Item**.

   The **Retail Item Entry** window will display.
2. Select **Task** → **Create New Sale**.
3. Enter the beginning date for the sale in the **Sale Start Date** field.
4. Enter the ending date for the sale in the **Sale Ending Date** field.
5. Enter the discounted price in the **Sale Price** field.

Copyright 2010, Resaleworld.com, Inc.

6. The **Active** check box should contain a check mark. Remove the check only if you decide not to put the item on sale.
7. Select the **OK** button.

To Change A Sale's Parameters (Sale Date or Price):

1. Double-click on the item in the Inventory window, or
   Highlight the item in the Inventory window, then select **Task** → **Item Maintenance** → **Edit Item**, or
   Right click on the item in the Inventory window, then select **Edit Item**.

   The **Retail Item Entry** window will display.
2. Select **Task** → **Edit Sale Information**.
3. Change the parameters of the sale as necessary. Remove the check from the **Active** check box if you wish to not put the item on sale or to end the sale immediately.
4. Select the **OK** button when finished.

Related Topics

Change Selling Price at Point of Sale

COPY RETAIL ITEMS

Inventory Module → 2. Inventory Tab

It is not possible to copy retail items. Use the Receive Retail Inventory routine to change the **Quantity on Hand** instead.

You may also use the **Duplicate** button, located at the top of the screen.

Related Topics

Receive Retail Inventory

Copy an Item

Delete Retail Items

To maintain data integrity it is not possible to delete retail items.

Related Topics

Delete an Item

Reduce the Quantity on Hand of a Retail Item

Receive Retail Inventory

Tips on How to Enter Items Faster

Entering large amounts of text and data into a computer program is a keyboard centric operation. **T*he less you have to use the mouse, the better!***

The good news is that the inventory entry process (and Point of Sale) in Liberty are designed to be **Mouseless**. You will dramatically speed the rate at which items are entered by avoiding use of the mouse and by using other techniques described below.

Use These Tips And Tricks To Shortcut Your Way Through The Item Entry Process:

1. Keep your hands on the keyboard, using the <Enter> key to move from field to field. Liberty is specifically designed to operate in this fashion. Not only does the cursor advance

Copyright 2010, Resaleworld.com, Inc.

from field to field when you use the <Enter> key, when you are finished entering information and press <Enter> the <Save> button will usually be highlighted. Pressing <Enter> again will both save the item and start you adding the next item. In short, you should rarely have to use the mouse when adding inventory.

2. You can customize the item entry screen by reordering the fields to suit your preferences. For details, please see Set Item Entry Field Preferences.

3. When entering the price, if the item is priced at a flat dollar amount (e.g. 10.00), just type the dollars and press <Enter> - the decimal and the cents will automatically be entered. For more details see the paragraph entitled **Price Extension** in Define Default Information for Accounts.

4. Liberty remembers the Category of the previously entered item, so entering like types of merchandise in batches (e.g. all dresses, then all blouses, etc.) will allow you to save time.

5. Use the <**Tab**> to advance the cursor from any Attribute directly to the Description field. This lets you skip Attributes you don>'t wish to fill in. (Using the <Enter> key while in Attributes moves the cursor to the next Attribute.)

6. Use the **<Shift> <Tab>** key combination to move the cursor back to the previous field without using the mouse. **<Shift> <Tab>** is the opposite of the **<Tab>** and **<Enter>** keys: press the **<Tab>** key while holding down the **<Shift>** key.

7. Many stores carry two or more items with identical Level 3 Category names that belong to a different Category Level 1 or 2.

   Example: a clothing store might carry Blouses for both children and women. As a result, when **Blouse** is typed, the first blouse to appear is the Children's Blouse, because the **C** in Children comes before the **W** in Women's.

   This is fine if you are entering a children's blouse, but how do you avoid using the mouse to choose the women's blouse?

   Simple: press the down arrow key! This will cause the next Category to show in the Category field. If you go too far, use the up arrow key to go back.

8. Make sure the Tax Codes are set up properly using Product Lines and Categories. This way you don't have to enter or change the Tax Type each time an item is entered.

9. Make sure all unnecessary Categories are either inactive or invisible.

10. If you change the date, the new date will carry forward until you either change it again or Close the screen.

11. Use the F2 Description Popup to create shortcuts for entering frequently repeated information.

12. When entering similar retail items, add them one after another and use the Duplicate

Copyright 2010, Resaleworld.com, Inc.

button.

13. Don't go overboard - enter information only into the fields you need, and don't be redundant by, for instance, entering a color attribute and then repeating the color in the Description.

Related Topics

Keyboard Shortcuts

How to Enter Sales Faster

Updating Web_Items

ADDING ITEMS WITHOUT PRICES, THEN PRICING LATER

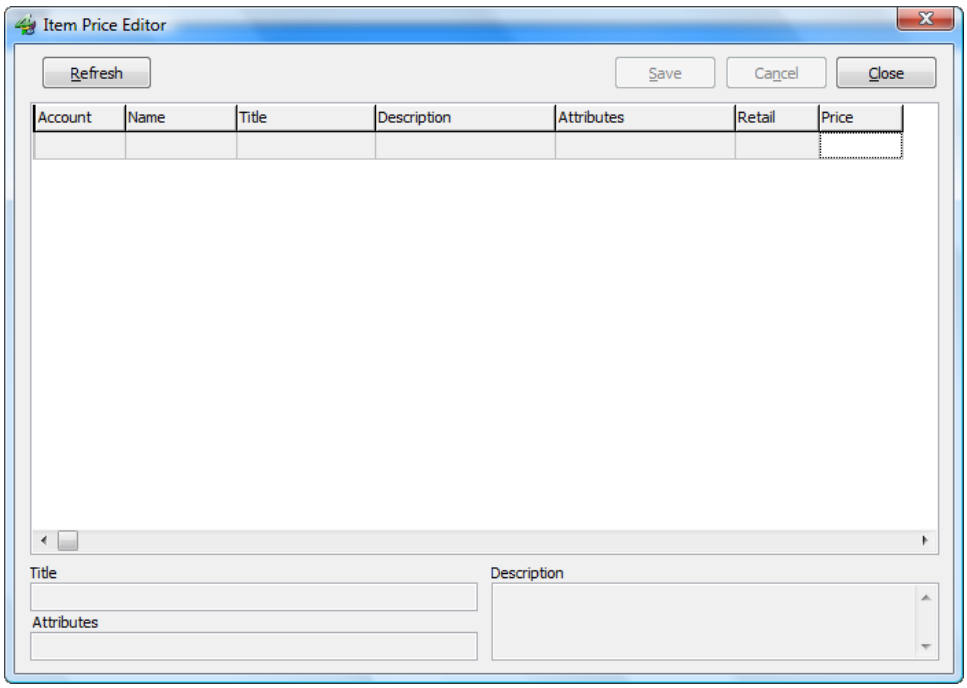
Inventory Module → *Activities* → *Inventory* → *Edit Prices*

Some stores find it faster and/or more convenient to enter items without their prices, then come back to the items later to price them. The **Edit Item Prices** routine provides a convenient method for doing so.

To Edit Item Prices

1. Enter items without prices.
2. Select **Activities** → **Inventory** → **Edit Prices**. The **Item Price Editor** will display.

Copyright 2010, Resaleworld.com, Inc.



3. In the **Price** field on the far right side of the screen change the prices of items as needed.
4. Select the **Save** button when finished.
5. Select the **Close** button.

If you are considering using this routine, see the section entitled Pricing Guide for an alternative approach to entering prices.

Related Topics

How to Enter Sales Faster

Updating Web_Items

Pricing Guide

FIND AN ITEM FROM WITHIN AN ACCOUNT

Inventory Module → Task → Item Maintenance → Find Item

This routine is particularly useful when an account contains a large number of items. There are two ways to find items:

- By Item Number
- By Date Received

To Find An Item:

1. Lookup the account the item(s) are located in.
2. Select the **2. Inventory** tab.
3. Select **Task** → **Item Maintenance** → **Find Item**.
4. Select either **Item Number** or **Date Received**.
5. Enter the Item Number or Date Received in the dialog provided.
6. Select **OK**.

Related Topics:

Find an Item using Item Lookup

Finding Items with a Lost Tag

Finding Items with a Status of Needs Info

Find an Item in Any Account Using Item Lookup

Inventory Module → *File* → *Item Lookup*

The Item Lookup window lets you view items from all accounts based on search criteria you specify. The Item Lookup routine is useful for a variety of purposes, including:

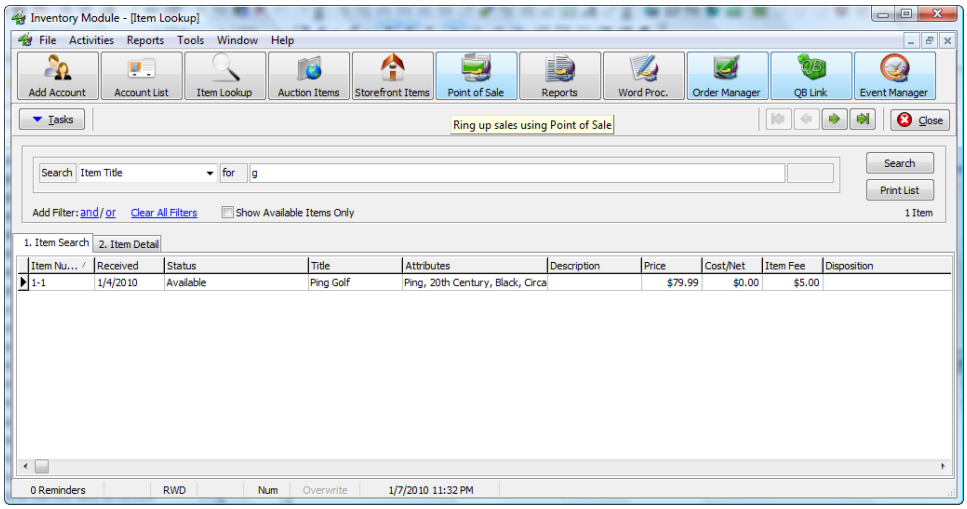
Copyright 2010, Resaleworld.com, Inc.

- Quickly viewing detailed item information without looking up an account, then finding the item within that account.
- Finding items with a lost tag.

To Find Items Using Item Lookup:

1. From the Inventory Module main menu, click on **File➔Item Lookup**, or Click on the **Item Lookup** icon at the top of the screen.

   The **Item Lookup** window will display:



2. Select a search parameter from the **Search By** drop-down. The Search By drop-down is located immediately to the right of the word **where** (just under the Tasks button).
3. Enter the search parameter in the **Search For** field, which is located immediately to the right of the Search By drop-down. Note the following:
   a. When entering a date, enter in the format **MM/DD/YYYY**.
   b. When searching for numbers, use the following **operators**: > for greater than, < for less than, and = for equals.
   c. When searching for numbers do not put a space between the operator and the number. In addition, do not use a dollar sign ($). For example, when searching for items priced above $10.00, the correct syntax would be **>10.*00***. Entering > 10.00, >$10.00, or > $10.00 will not work.
4. Adding additional filters will narrow the Search even more. For instance, to find a Size 12 red dress with a Status of Available, do the following:
   a. Select Item Title from the Search By drop-down and enter dress red (or red dress) in the Search For field.

Copyright 2010, Resaleworld.com, Inc.

b. Click on **Add** next to **Add Filter**.

c. Select Attributes from the Search By drop-down, and enter 12 in the Search For field.

d. Click on the **Show Available Items Only** check box.

e. Click the **Search** button.

> ***Tip***: *The and/or selection is **Boolean** in nature. For example, to search for items that contain both **10** in the Item Name and **black** in the Item Title, select **and**. To search for items that have either **10** in the Item Name or **black** in the Item Title, select **or**.*

5. Select the **Search** button.
6. For more details about a particular item, highlight the item in the **Search Results** in the lower half of the window, then click on the **2. Item Detail** tab.

   Alternatively, to go directly to a particular item, highlight the item then select **Task** → **View Selected Item**.

> ***Note:*** *Previous versions of Liberty required separating words with a comma to find all instances of those words, regardless of the order in which they appear. This is no longer necessary. In fact, do NOT use commas to separate words as this will cause the search to fail.*
>
> *For example, if searching for all items that contain **2 pc dress** in the Item Title, do not enter **2,pc,dress,**. Instead enter **2 pc dress**. All items containing 2 pc dress (and dress 2 pc) in the Item Title will be listed.*

> ***Tip:*** *If the first search doesn't work, try altering the information entered in the **Search For** field. Broadening the search can help as well.*

Search for Lost Tag Example

Example Of How To Search For An Item With No Tag:

1. Select **File** → **Item** Lookup or click the **Item Lookup** button.
2. Select **Item Title** in the **Search By** field.
3. Enter the words or phrases you believe accurately describe the item in the **Search For** field.

Copyright 2010, Resaleworld.com, Inc.

4. Select the **Search** button.
5. For more details about a particular item, highlight the item in the Search Results in the lower half of the window, then click on the **2. Item Detail** tab.

> ***Tip:*** *If the first search doesn't work, try altering the information entered in the* ***Search For*** *field. Broadening the search can help as well.*

> ***Note:*** *Previous versions of Liberty required separating words with a comma to find all instances of those words, regardless of the order in which they appear. This is no longer necessary. In fact, do NOT use commas to separate words as this will cause the search to fail.*

For example, if searching for an item that contains ***2 pc dress*** in the Item Title, do not enter ***2,pc,dress,***. Instead enter ***2 pc dress***. All items containing 2 pc dress (and dress 2 pc) in the Item Title will be listed.

Related Topics

Find an Item

Finding Items with a Lost Tag

Finding Items with a Status of Needs Info

FINDING ITEMS WITH A LOST TAG

Please see the section entitled Find an Item using Item Lookup for information on this subject.

The **Wish List** can also be used to find items without a tag. Please see the section entitled Using the Wishlist for more information.

Related Topics

Wishlist Overview

Find an Item using Item Lookup

Find an Item

Finding Items with a Status of Needs Info

Copyright 2010, Resaleworld.com, Inc.

FINDING ITEMS WITH A STATUS OF NEEDS INFO

The Reminders routine is specifically designed to lookup items with a Status of Needs Info. For more information, see the section entitled Reminders.

REMINDERS

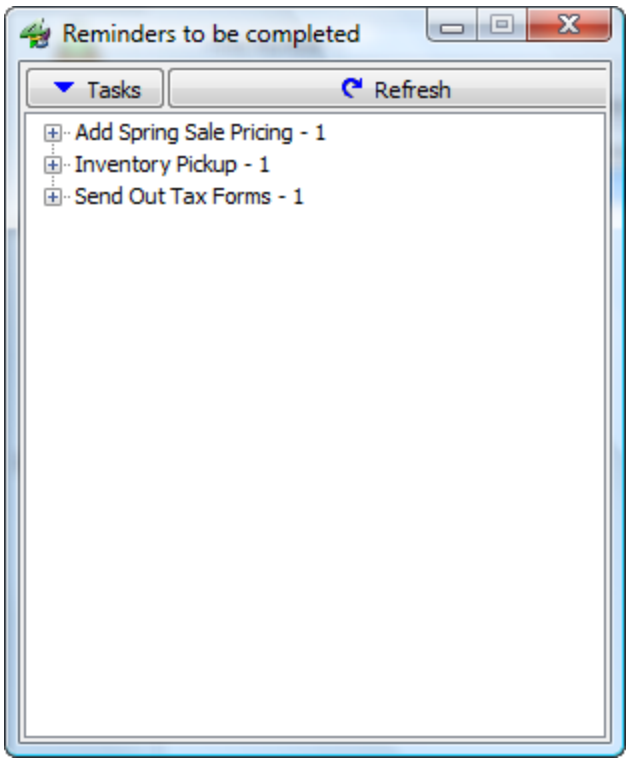
Inventory Module → *Activities* → *View Reminders*

The **View Reminders** routine is designed to be used as a To-Do List. In addition to the ability to add and categorize Reminders, View Reminders automatically lists all items with a **Status** of **Needs Info**. double-clicking on any item listed in View Reminders under the **Items that need Info Category** will bring up that item in the **Item Entry** window, ready to be edited. This provides a convenient method for finding and editing items that still need information added before putting out on the sale floor or uploading to a web site to sell online.

To View Reminders:

1. From the main menu of the Inventory Module, select **Activities** → **View Reminders**. The **Reminders to be Completed** dialog will display:

Copyright 2010, Resaleworld.com, Inc.

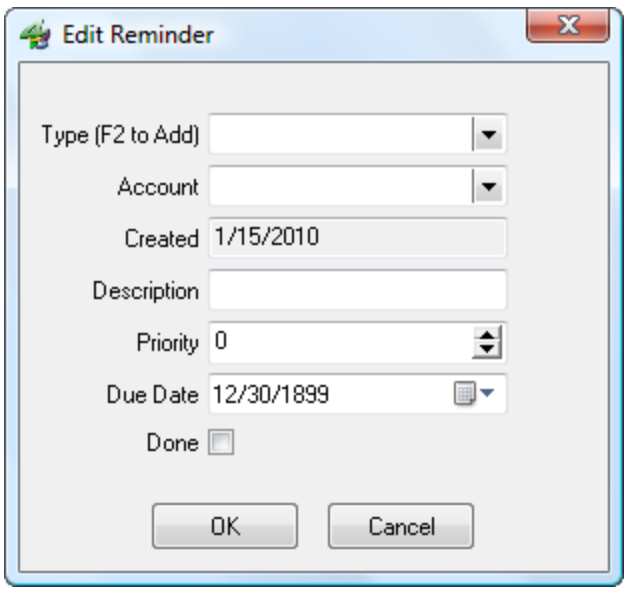


2. Click on the + symbol to view tasks under a particular **Category**.

Double-clicking on a **Reminder** under the **Items that need Info Category** opens the **Item Entry** window with the item selected ready to be edited.

To Add A Reminder:

1. In the Reminders to be Completed dialog, select **Task** → **Add Reminder**. The **Edit Reminder** dialog will display:



2. Select a **Category** from the **Type** drop-down. Press the **<F2>** key to add a new **Reminder Category**.

> ***Note**: Reminders for **Items that need Info** are automatically generated by Liberty. It is not possible to add a Reminder to this Category.*

3. Select a client account for the Reminder from the **Account** drop-down.
4. Enter a description for the Reminder in the **Description** field.
5. Set a **Priority** for the Reminder.
6. Enter a due date in the **Due Date** field.
7. Select the **OK** button.

To Mark A Reminder As Completed:

1. Double-click on the **Reminder**.
2. Select the **Done** check box.
3. Select **Task** → **Refresh** to update the Reminders display.

POST AN ITEM AS DONATED, RETURNED (TO THE CONSIGNOR), OR OTHER

Inventory Module → Activities → Inventory → Post Items → Single Item Tab

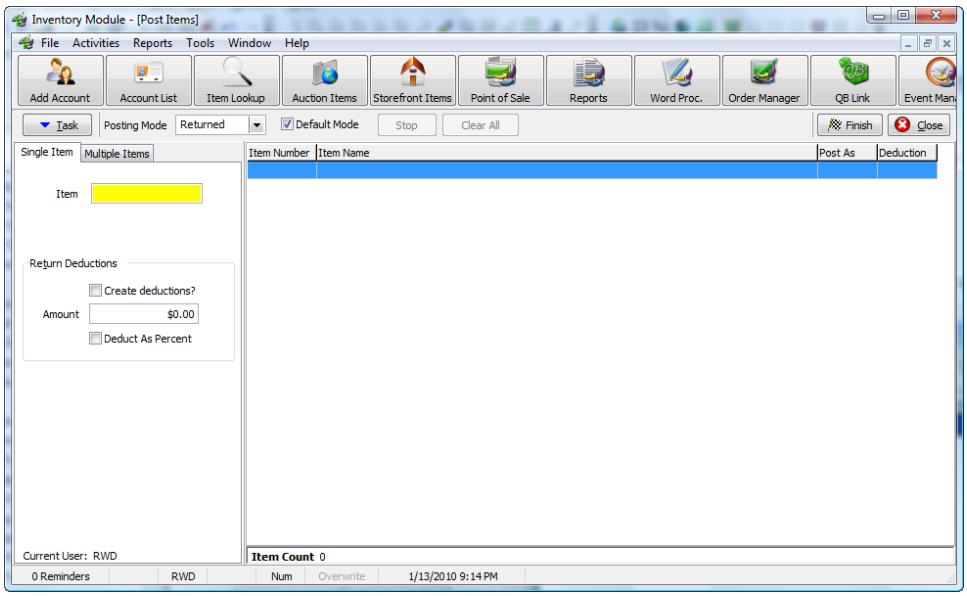
Use this procedure when you want to post an item as returned to a client, donated, or post it with another status of your choice using **Other**. The status of the item is displayed in the Inventory window, and printed on Item Lists and certain reports.

Copyright 2010, Resaleworld.com, Inc.

Note: *It is possible to indicate on price tags whether an item should be donated or not by displaying an asterisk next to the Price Code. See Select Printers & Printing Defaults for more information.*

To Post Items As Returned, Donated Or Other:

1. From the main menu, select **Activities** → **Inventory** → **Post Items**. The Post Items window will display:



2. Select the type of post from the **Posting Mode** drop-down list. The term **Returned** is used for items that are returned to the client.

   In addition to **Donated** and **Returned**, additional terms may be created (such as **Threw Out**, **Lost**, etc.).

To Create a New Posting Mode:

a. Select **Task** → **Other – F4**. The **Edit List** dialog will display.

b. Select the **Add** button.

c. Enter the **Posting Mode** in the dialog, then click **OK**.

3. Scan the bar code(s) with a bar code reader, or enter the item number(s) in the **Item** box. The item information appears in the list on the right.

4. When all items have been entered, click on the **Finish** button.

Copyright 2010, Resaleworld.com, Inc.

Assess a Fee for Returning Items

You may assess clients a fee to return items to them. These fees will appear in the clients' transaction histories.

To Assess A Fee For Returning Items:

Fees may be assessed either as a specific dollar amount or as a percent of the item's original price.

1. From the main menu, select **Activities** → **Inventory** → **Post Items**.
2. Select **Returned – F2** as the **Posting Mode**.
3. Scan the bar code(s) on the price tags for the items being returned with a bar code reader, or enter the item number in the **Item** box. The item information appears in the list on the right side of the screen.
4. Click the **Create Deductions** check box so a check mark appears.
5. Enter the amount to be assessed for each returned item in the **Amount** field, or

   Select the **Deduct as Percent** check box, then enter the percentage in the Amount field. Note that the percentage will be calculated on the item's original price. For example, an item with an original price of $10.00 with a 10% deduction will incur a $1.00 fee.
6. When finished select the **Finish** button.

Related Topics

Post a Range of Items as Returned, Donated, or Other

Changing an Unsold Item's Status Using Unpost

Post a Range of Unsold Items as Returned, Donated, or Other

Inventory Module → *Activities* → *Post Items* → *Multiple Items Tab*

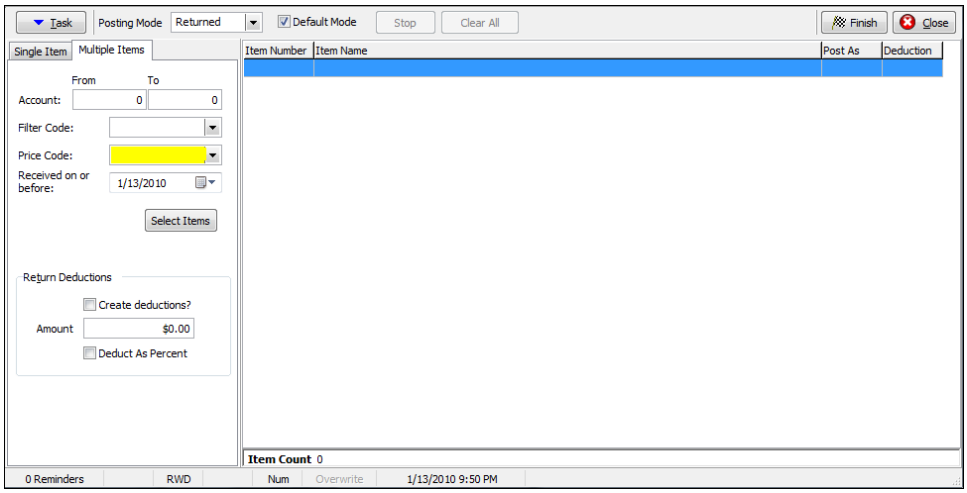
It is possible to post a range of items all at once rather than post each item individually. While this routine eliminates the necessity of posting items individually, it has the drawback of being a blunt instrument. Posting a range of items instead of taking the time to enter each item individually (which can be done quite quickly using a bar code reader) results in the total inability to track shrinkage.

Posting a range of unsold items, as described below, will post EVERY item fitting the parameters specified as Returned, Donated, or Other, even if the item is no longer in the store due to loss, theft, poor tracking, what have you. *Although it is included in Liberty for those users who have asked for this routine, we do not recommend using this routine.*

Warning: When using this routine, start by performing a backup in case a mistake is made. There is no way to undo the effects of this routine after it is run other than to restore from a backup, or to use the Unpost routine on all of the improperly posted items.

To Post a Range of Items as Returned, Donated or Other:

1. Perform a backup: if you make a mistake running this routine, the only way to correct it is to restore from backup. If on a network, have all users stop using Liberty and perform this routine from the Server.
2. From the main menu, click on **Activities**, and then **Post Items**.
3. Select the **Multiple Items** tab. The screen will display as shown below:



4. Select the type of post from the **Posting Mode** drop-down list. If you choose F4 - Other, enter the word or phrase you wish to have the item posted as (e.g. *Broken*, *Stained*, *Lost*, etc.) in the **Other Description** field.
5. Enter the appropriate parameters in the fields provided. If you are unfamiliar with entering

Copyright 2010, Resaleworld.com, Inc.

6. When all parameters have been entered, click on the **Finish** button.

You may assess clients a fee to return items to them. These fees will appear in the clients' transaction histories.

To Assess a Fee for Returning Items:

1. Perform a backup: if you make a mistake running this routine, the only way to correct it is to restore from backup. If on a network, have all users stop using Liberty and perform this routine from the Server.
2. From the main menu, click on **Activities**, and then **Post Items**.
3. Select the **Multiple Items** tab.
4. Select Returned (F2) as the Posting Mode.
5. Enter the appropriate parameters in the fields provided. If you are unfamiliar with entering parameters, please see Set Report Parameters for more information.
6. Click on the **Create Deductions** check box so a check mark appears.
7. Enter the amount to be assessed for each returned item in the **Amount** field.
8. Click on the **Finish** button.

Related Topics

Post an Item as Returned, Donated, or Other

Changing an Unsold Item's Status Using Unpost

Changing an Unsold Item's Status Using Unpost

Inventory Module ➔ *Activities* ➔ *Post Items* ➔ *Single Item Tab*

Sometimes it is necessary to change the status of an item that has been posted. For example, when an item is posted as **Donated** must be changed to a status of **Returned** (to the client). In cases such as this it is necessary to first **Unpost** the item, then re-post it.

To Unpost an Item

1. From the main menu, click on **Activities**, and then **Post Items**.
2. Select "Unpost" from the **Posting Mode** drop-down list.
3. Scan the bar codes with a bar code reader, or enter the item numbers in the **Item** box. The item information appears in the list on the right.
4. To unpost multiple items, click the **Multiple Items** tab in the left-hand panel. This tab allows you to select a range of items to unpost.
5. When all items have been entered, click on the **Finish** button.

Related Topics

Post a Refund

Post an Item as Returned, Donated, or Other

WISH LIST OVERVIEW

Inventory Module ➔ *Task* ➔ *Wish List*

The **Wish List** is a great way to increase sales and customer satisfaction. Use the Wish List to keep a list of items requested by customers that are not currently in inventory.

The Wish List is also used to find the account number and item number for an item with no price tag.

To make Wish List matches, Liberty compares Wish List requests with inventory in stock. Where matches are made, the customers' names, addresses, and phone numbers are listed, with a list of the requested items next to the matched items.

There are several ways to see what matches are currently available.

Copyright 2010, Resaleworld.com, Inc.

To View Wish List Matches:

1. Run a Cross Reference Report.
2. View Wish List Matches while adding items.
3. View matches while adding the item(s) to the Wish List.

To Make the Wish List Effective:

A very important concept to understand when using a computer to search for items such as with the Wish List is that computers are not capable of realizing that **G**, **GR**, **GRN** and **GREN** and **GREEN** may all mean the same thing. If you intend to use the Wish List routine, **consistency is critical**. Computers only search and find items if the items searched for conform precisely to the parameters specified. This is why Liberty uses Categories, Product Lines, Tax Codes, and Attributes: to create consistency.

Maximize the Effectiveness of the Wish List:

Use **Categories**, **Attributes**, and **Brands** when entering items.

Related Topics

Reports

View Wish List Matches

Using the Wishlist

Overview of Categories, Tax Codes, and Product Lines

Assign Attributes to Categories

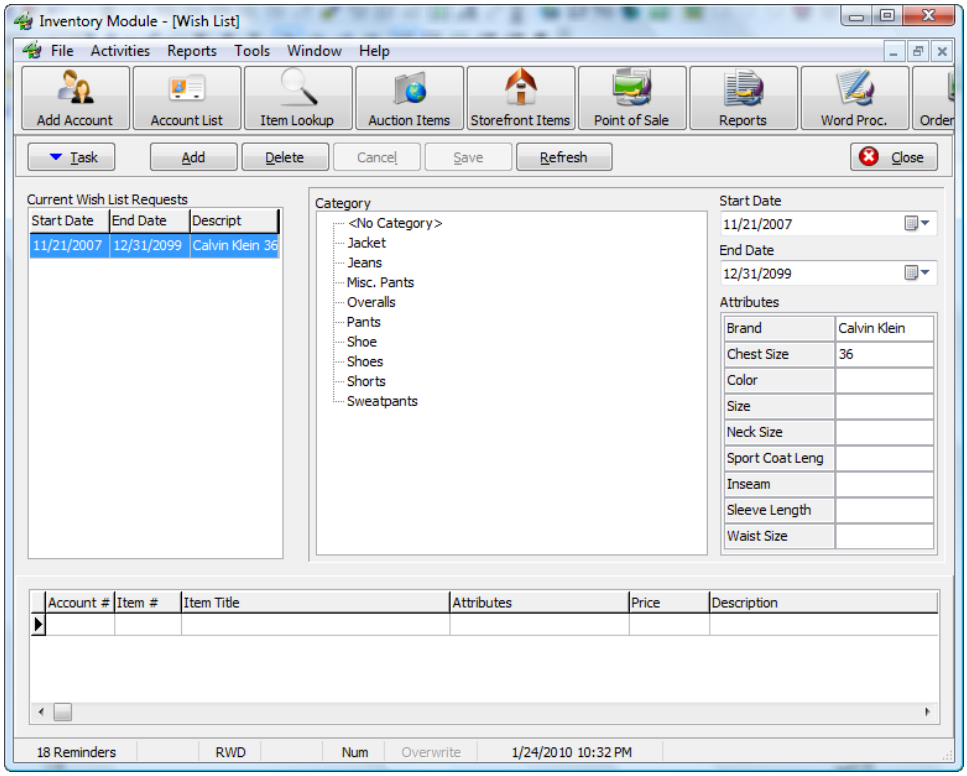
USING THE WISH LIST

Inventory Module → *Task* → *Wish List*

When an item is added to a **Wish List**, a search automatically takes place. The Wish List searches **One of a Kind** items. It does not search **Retail** items.

To Add a Customer Request for an Item to the Wish List:

1. **Lookup** the Account for which the ***Wish*** is to be added.
2. Select **Task** → **Wish List**. The **Wish List** dialog will display:



3. If this is the first Wish for this account, go to step 4. Otherwise select the **Add** button.
4. Select the **Category** of the item wished for from the **Category Explorer**. You may select at any Category Level - 1, 2, or 3.
5. Enter the **Start Date** and **End Date** for Wish Searches to occur in their respective fields. Wish List requests are deleted automatically after their End Date: the assumption being that after a certain amount of time, the customer will no longer have a desire for the item sought.
6. Optional: Enter the **Attributes** of the item wished for.

> ***Note:*** *Up to a certain point, the more Attributes entered, the better.*

7. Select the **Save** button. The Wish List immediately searches all available items on file.

Copyright 2010, Resaleworld.com, Inc.

Matches are shown in the Grid in the lower part of the window.

> ***Tip**: Double-clicking on matches in the Grid will cause the item to appear in an Item Entry window.*

> ***Tip**: If you're not sure of the best Attributes to use (for instance, the best size when searching for a dress, or the best type of wood when looking for an antique table), enter multiple wishes with slightly different Attributes.*

Edit a Wish List Request

1. **Lookup** the Account for which the ***Wish*** is to be added.
2. Select **Task** ➔ **Wish List**. The **Wish List** dialog will display.
3. Highlight the Wish List Request to be edited.
4. Make the necessary changes.
5. Select the **Save** button.

Delete a Wish List Request

1. Highlight the **Wish List Request** in the list of **Wish List Requests**. (The List is located in the panel below the Task and Add buttons.)
2. Select the **Delete** button.

> ***Note:** Wish List requests are deleted automatically after their End Date.*

Related Topics

Looking for Wish List Matches While Adding Items

Wish List Overview

Find an Item using Item Lookup

Copyright 2010, Resaleworld.com, Inc.

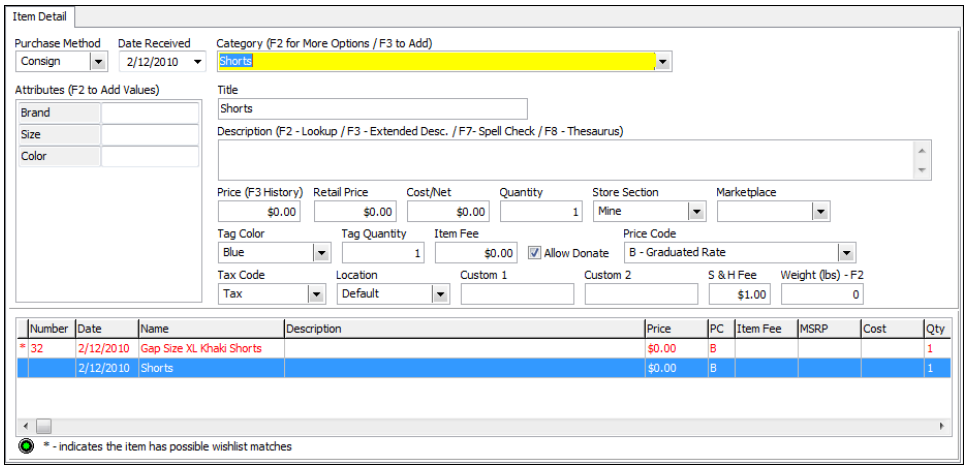
Looking for Wish List Matches While Adding Items

Inventory Module ➔ *Task* ➔ *Wish List*

When an item is added to inventory that matches a wished for item an asterisk (*) will appear at the extreme left of the **Grid** at the bottom of the Inventory Entry window, *just to the left of the Item Number column*.

To View a Wish List Match in the Item Entry Grid:

1. Right-click on any item with an asterisk showing it has a possible Wish List match.
2. Select **Show Wish List Matches**.



Related Topics

Wish List Overview

Find an Item using Item Lookup

Finding Items with a Lost Tag

Posting Sales (SOS)

Copyright 2010, Resaleworld.com, Inc.

LIBERTY POINT OF SALE OVERVIEW

Items sold to customers who are present in your place of business are posted using **Point of Sale** (PoS). See the sections covering the **Order Manager** for information on handling online sales.

The term **posting** refers to marking an item as sold, recording the date of the sale, price of the sale, net amount to be paid to the customer, etc. If an item is not posted, the consignor will not be paid.

Before using Point of Sale it is helpful to set up and customize Liberty Point of Sale for maximum efficiency. Please see the section entitled Set Up Checklists for more details.

The most efficient way to post a sale is to use a bar code reader to scan the bar code printed on the price tag. We recommend using a bar code reader for posting sales for two reasons. First, it's much faster and easier than entering the information by hand. Second, a bar code reader eliminates the opportunity to make errors when posting. Bar code readers are rated to one error per 100,000 scans or better.

If you choose not to use a bar code reader, or need to post an item and the bar code reader is unable to successfully scan the bar code, you may type in the account number and item number listed on the price tag.

PoS Functions

Using PoS it is possible (though not required) to do many things, including but not limited to:

- Scan bar codes printed on price tags and price labels by Liberty.
- Scan UPC bar codes for retail items.
- Post sales at full or reduced price.
- Accept and track payments of any type (Cash, Check, Visa, Master Card, Coupons, etc.)
- Refund sales.
- Post items and/or entire sales as tax exempt.
- Track customer purchases.
- Print receipts.
- Operate an electronic cash drawer and manage the money it contains.

Copyright 2010, Resaleworld.com, Inc.

Some Additional Important Information About PoS:

- There are special reports for analyzing information developed using PoS. Particularly useful are the **End of Day Sales Detail** and **End of Day Payment Detail** reports. Please see Liberty Reports Overview for more information.
- Point of Sale can be run on multiple workstations simultaneously.
- While recommended, using PoS does not require printing a receipt.
- While recommended, using PoS does not require operating a cash drawer, nor managing cash drawer balances.
- While recommended, using PoS does not require tracking customer purchases.
- Items may be posted as **Returned** (to the client), **Donated**, etc., however, the **Post Sales** routine is used to accomplish this task, not PoS. See the section entitled Post a Return or Donation for more information.

Related Topics

Starting Liberty PoS

Set Up PoS Default Preferences

How to Enter Sales Faster

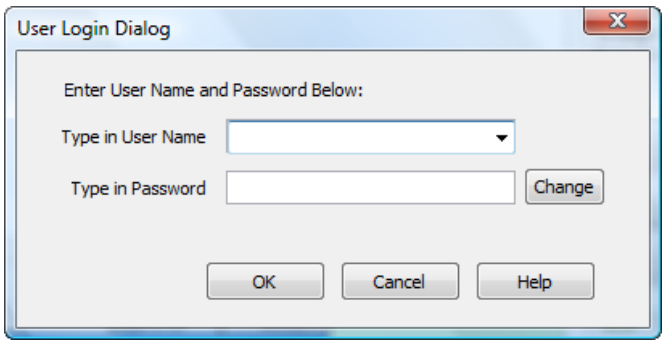
Keyboard Shortcuts

STARTING POINT OF SALE

To Start Liberty Point Of Sale:

1. First, do either of the following:
   a. Select **Start** → **Programs** → **Liberty4 Consignment** → **Liberty Point of Sale**.
   b. Click on the Liberty Point of Sale **icon** on your computer's **desktop.**

   The **User Login Dialog** will display:

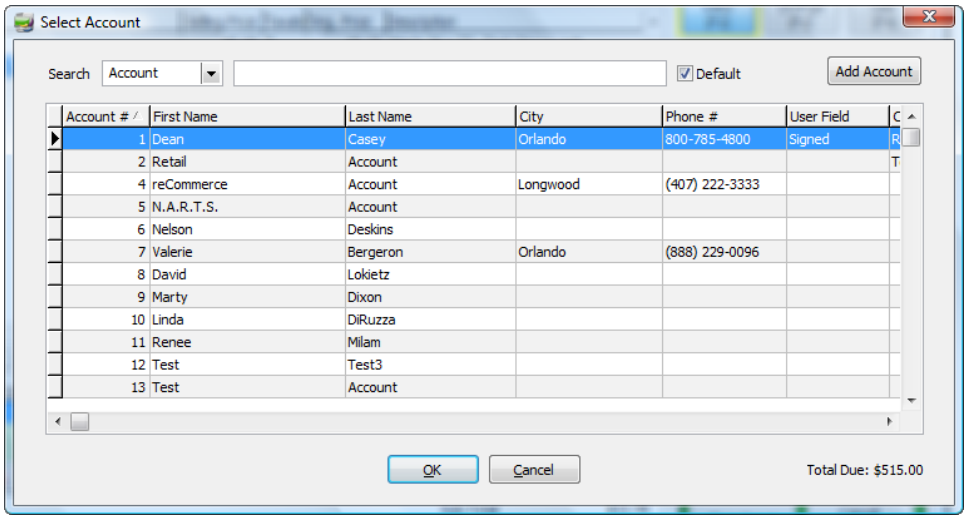


2. Enter your **User Name** and **Password** in the appropriate fields.

> ***Note:*** *When you first use the system, you may* ***Login as RWD and use RWD for the password****. These should be changed, and each user should have his/her own user name and password. To change these, please see the section entitled* *Set Up Employee Access to Liberty*

3. Click the **OK** button in the User Login dialog. The Point of Sale screen will display. If the Select Account dialog appears (below), you must first lookup the customer. The **Find** field is used to lookup a customer, however, you must first select which field to use for looking up the customer (last name, first name, phone number, etc.), click on the appropriate column header.

   Example: To find someone by last name, first click on the **Last Name** column header, then type the last name in the Find field.



> ***Tips****: Pressing <Esc> will bypass the Select Account screen.*
>
> *You can reorder and change the size of the fields listed in the Point of Sale and Account Lookup windows.*

***To change the field order**, click and dragging the field labels (the header at the top of each column) to the left and right.*

***To change the size of a field**, hold the mouse directly over the vertical line separating each field label. The mouse pointer will change to two vertical lines. Click and drag the field to resize it.*

Related Topics

Starting the Liberty Program

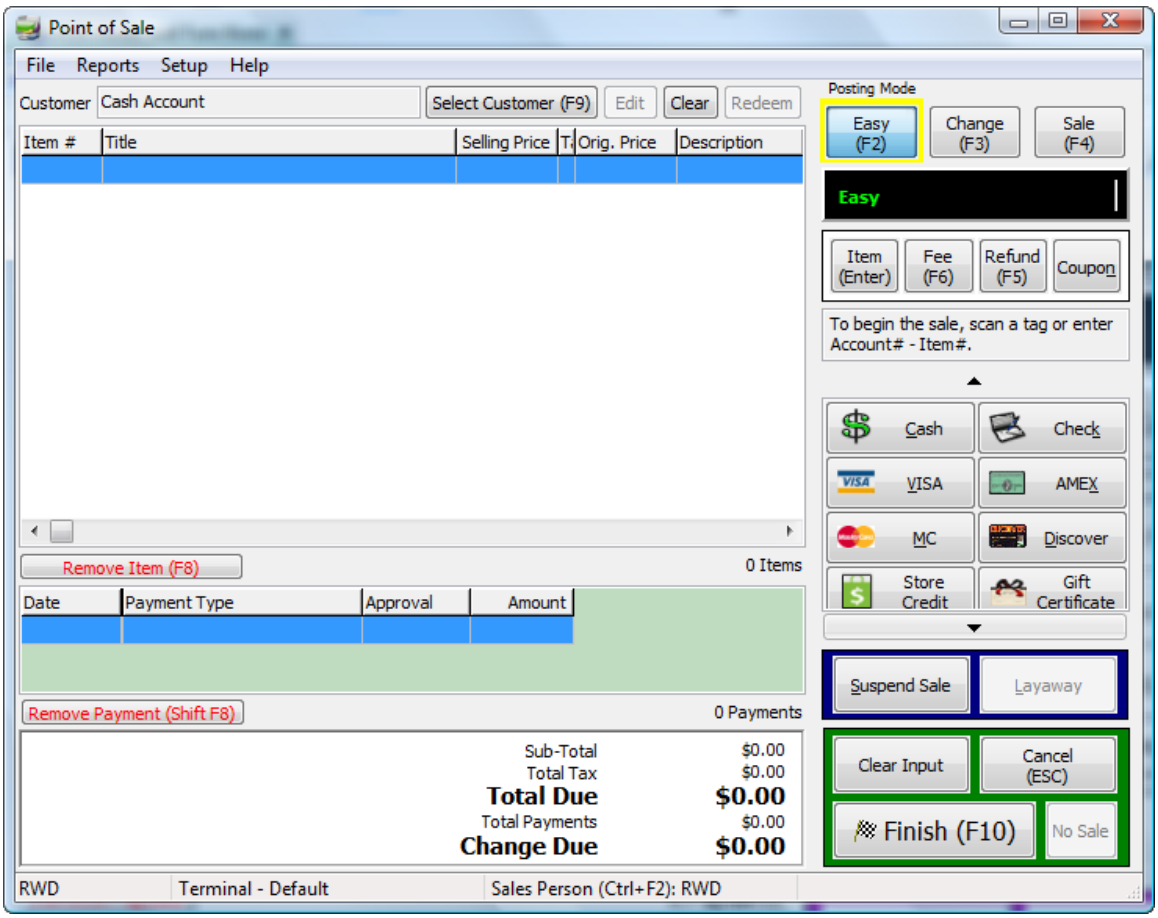
Password and User Name for Logging on the First Time

Liberty Point of Sale Overview

PoS Fields and Functions

Following is a brief overview of the fields and functions on the primary PoS screen:

Copyright 2010, Resaleworld.com, Inc.



Refer to the section of this help covering specific aspects of PoS for more detailed information.

Copyright 2010, Resaleworld.com, Inc.

PoS Fields & Functions

Display	The **Display** is located toward the top right portion of the screen. It has a **black** background with **bright green characters**. It is below the three Post Buttons. Characters entered on the keyboard appear in the Display, as do bar codes when they are scanned (albeit very briefly).
Easy Post (F2)	Posts items at the same price as on the tag. When automatic markdowns are in effect, Easy Post will automatically calculate the correct, marked down price.
Change Post (F3)	Use Change Post to change the price an item sells for, or to change its taxability.
Sale Post (F4)	Use Sale Post to discount items by a specific percentage (for instance, during a 20% off sale).
Item	This is the mouse click equivalent of pressing the <Enter> key.
Fee (F6)	Use Fee to charge a Fee or to ring up miscellaneous non-inventoried items.
Refund (F5)	Use Refund to refund customer purchases. Also useful for correcting posting errors by first refunding and then re-posting the item(s).
Coupon	Select **Coupon** when accepting a discount coupon.
Cash	Select Cash when accepting cash for payment.
Check	Select Check when accepting a check as payment.
Visa, AMEX, MC, and Discover	Make the appropriate selection depending on the Credit Card accepted.
Store Credit	Select Store Credit when a customer is using earnings from items sold on consignment to pay for their purchase.
Gift Certificate	Select when accepting a Gift Certificate as a form of payment.
Web Sale	Select Web Sale when an online customer pays via COD or by sending a check, rather than paying online (for example, with PayPal). By selecting Web Sale instead of another form of payment (such as Check), the sale will be recorded in the Transaction History and in Reports as a Web Sale and/or marked as Sold Online.
Sale Adjustment	Whenever a sold item is downloaded from eBay with any adjust-

Copyright 2010, Resaleworld.com, Inc.

	ments, use **Sale Adjustment** to track the adjustment within Liberty. Sale Adjustment can also be used to make a manual adjustment on items at any time, whether sold online or offline. To do either, simply type in the dollar amount and then click the Sale Adjustment button.
Clear Input	Select to clear the Display.
Cancel (Esc)	Select to cancel a sale (or press <Esc>).
Finish (F10)	When all items and payments have been entered, select **Finish** to complete the sale and, optionally, print a receipt.
Clear (Customer) (located to left of Easy F2 button)	Select to clear the selected customer from the sale. The Customer is displayed to the left of this button under **Customer Account**.
Select (Customer) (located to left of Easy F2 button)	Select to display the Customer lookup dialog. Use this to track customer purchases.
Remove Item (located in the left center of the dialog below the list of items)	Select to delete the highlighted item from the sale.
Remove Payment (located in the left center of the dialog below the list of payments)	Select to delete the highlighted payment from the sale.

Related Topics

Liberty Point of Sale Overview

Keyboard Shortcuts

Copyright 2010, Resaleworld.com, Inc.

How to Enter Sales Faster

Entering sales into most computer program is a keyboard centric operation. ***The less you have to use the mouse, the better!***

The good news is that the Point of Sale (and the Inventory Entry process) in Liberty are designed to be **Mouseless**. You will dramatically speed the rate at which sales are entered by avoiding use of the mouse and by using other techniques described below.

Tips and Tricks

Use these tips And tricks to shortcut your way through the Point of Sale Sales process:

1. Press the **Function Keys** on the keyboard instead of using the mouse to click on on-screen buttons.

   Examples: Press the **<F3>** key instead of clicking on the **Change Post** button.
   Press the **C** key instead of clicking on the **Cash** button.
   Press the **<F10>** key instead of clicking on the **Finish Sale** button. etc…

2. Use the **Keyboard Letter Combinations** instead of using the mouse to navigate through menu options.

   Example: Use the **<Ctrl> <T>** keyboard combination to make a sale tax exempt, instead of using the mouse to navigate to **File** ➔ **Tax Exempt Sale** on the PoS Main Menu.

3. Use the **<Shift> <Tab>** key combination to move the cursor back to the previous field without using the mouse. **<Shift> <Tab>** is the opposite of the **<Tab>** and **<Enter>** keys: press the **<Tab>** key while holding down the **<Shift>** key

4. Use a Bar Code Reader to scan price tags. Bar Code Readers are both faster and more accurate than entering account numbers and item numbers by hand.

5. Make sure the Tax Codes are set up properly using Product Lines and Categories.

Related Topics

Keyboard Shortcuts

How to Enter Items Faster

Copyright 2010, Resaleworld.com, Inc.

END OF DAY PROCEDURE

Use this procedure after closing your store at the end of the day.

1. Print an End of Day Summary report. Select **Reports** → **Sales Reports** → **End of Day-Summary Only** report to accomplish this task. (See the section entitled Reports for more information.)

2. Print an End of Day Payment Summary report. Select **Reports** → **Sales Reports** → **End of Day-Payment Summary** report to accomplish this task. (See the section entitled "Reports" for more information.)

3. Balance the cash drawer for the nightly bank deposit. In PoS, select **Reports** → **Terminal Total** to accomplish this task. See the section entitled Balance Cash Drawer for details.

4. Backup Liberty and store the disk(s) or other media in a safe place. Exit the program or select **Tools** → **Backup** to backup the Liberty data files. See the section entitled Backup Overview for more details.

   > ***Note:*** *You should backup Liberty* ***every day*** *and close all Liberty programs (Inventory Module, Order Manager, Point of Sale, Reports, Category Editor, etc.) at the end of each business day.*

5. Close the Inventory Module and Liberty PoS on all PCs.

6. **Optional**: It is recommended that you periodically restart your computer(s).

Related Topics

Liberty Reports Overview

Backup Overview

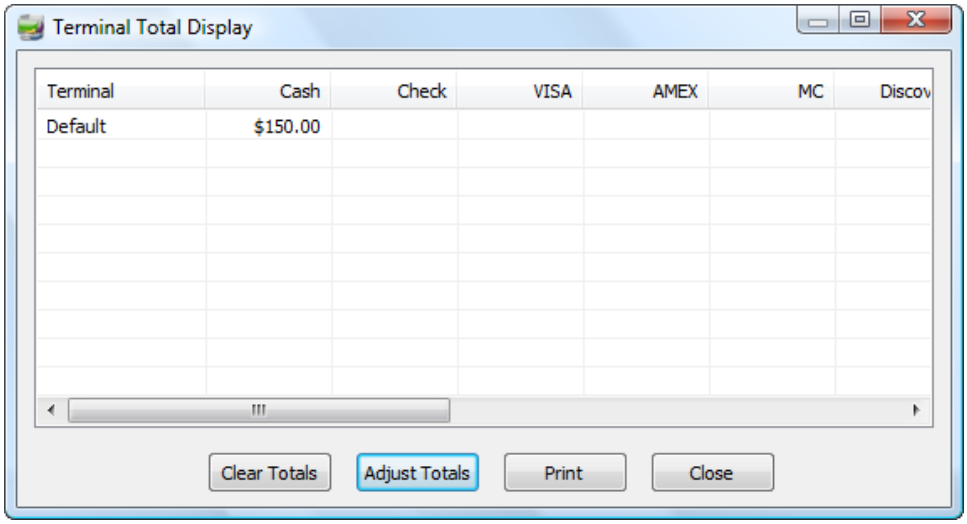
Copyright 2010, Resaleworld.com, Inc.

BALANCE CASH DRAWER

PoS Module ➔ *Reports* ➔ *Terminal Totals*

To Balance A Cash Drawer

1. Select **Reports** ➔**Terminal Total**. The **Terminal Total Display** will display:



2. **Optional**: Select **Print** to print a copy of the Terminal Total.
3. Count the money in the cash drawer and compare to the amount listed in the Display.

To Change The Amounts In The Terminal Total Display

1. Highlight the Terminal to be adjusted.
2. Select the **Adjust Totals** button.
3. Change the totals for the Terminal in the **Adjust Totals** dialog.
4. Select **OK**.

OR

1. Highlight the Terminal to be adjusted.
2. Click the **Clear Totals** button. This will set all amounts to zero for the selected Terminal.

Related Topics

Assign Terminal IDs

Network Set up Instructions

Point of Sale Computer Equipment

Liberty is designed to work with Point of Sale equipment including:

1. PoS Receipt Printers
2. Cash Drawers
3. Touch Screen Monitors

PoS equipment purchased from Resaleworld is guaranteed to work with Liberty. We regret that Resaleworld cannot provide any such guarantee to PoS equipment purchased elsewhere. For more information, please contact Resaleworld.

Related Topics

Computer Equipment Recommendations (Printers, Bar Code Readers, etc.)

Ordering Computer Equipment from Resaleworld

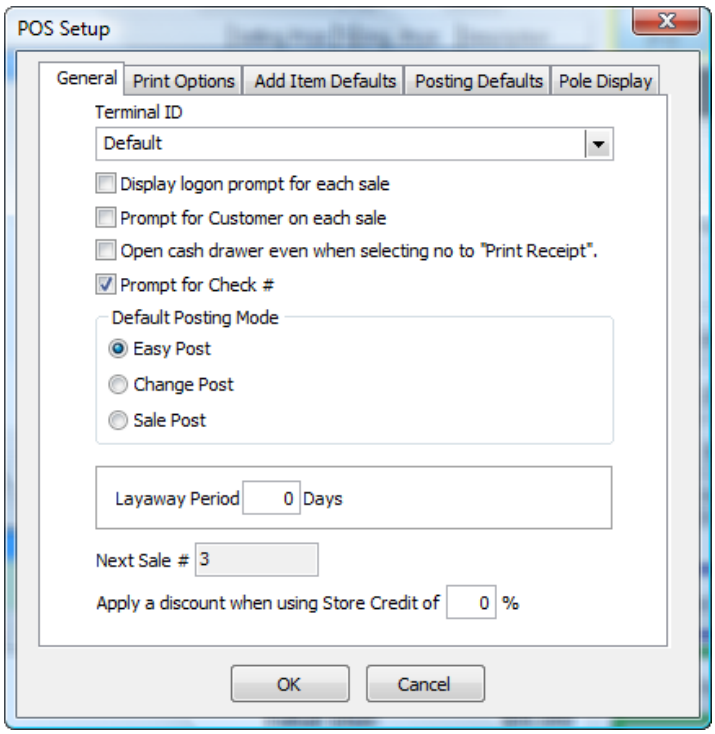
Add a Logo to Your Receipt

PoS Module ➔ Setup ➔ PoS Setup

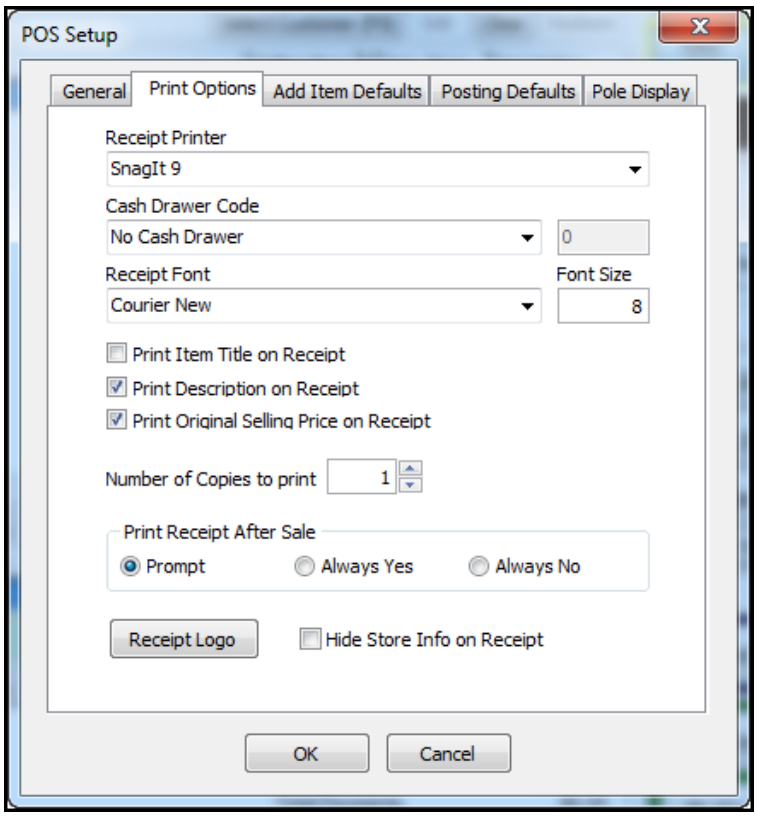
Liberty PoS allows you to select a bitmap file of your company logo to display on all printed receipts.

> ***NOTE:*** *All logos must be in bitmap (.bmp) format. No other image formats are supported.*

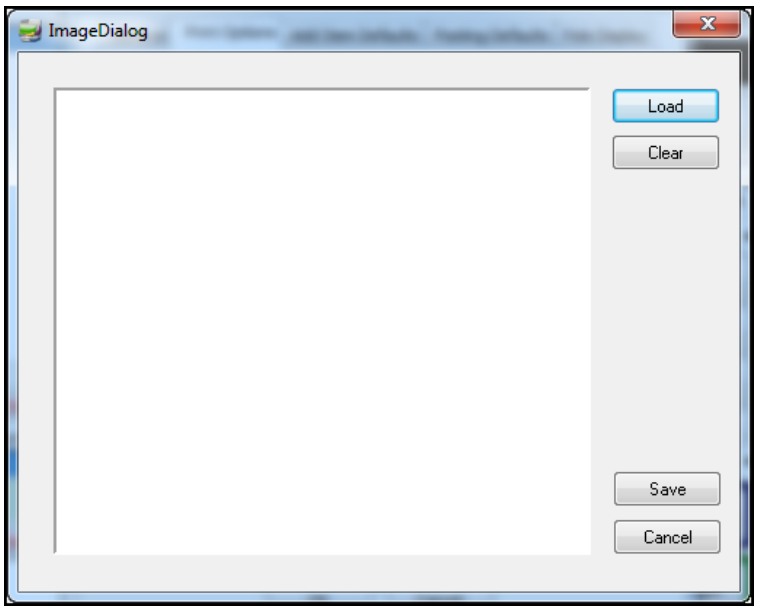
1. Select **PoS ➔ Setup ➔ PoS Setup**. The **PoS Setup** window will display.



2. Click the **Print Options** tab.



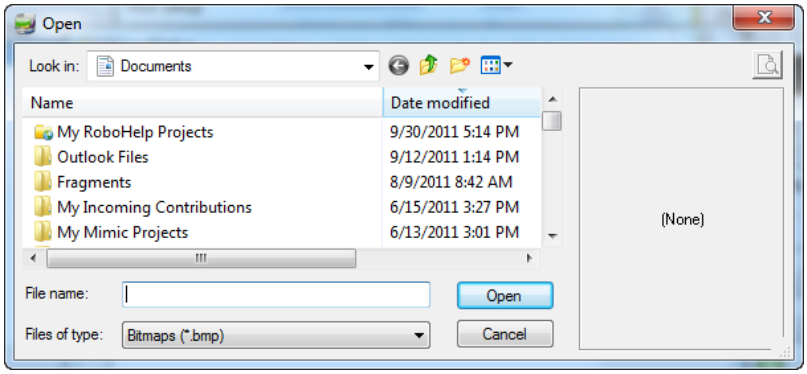
3. Click the **Receipt Logo** button. The **Image Dialog** displays.



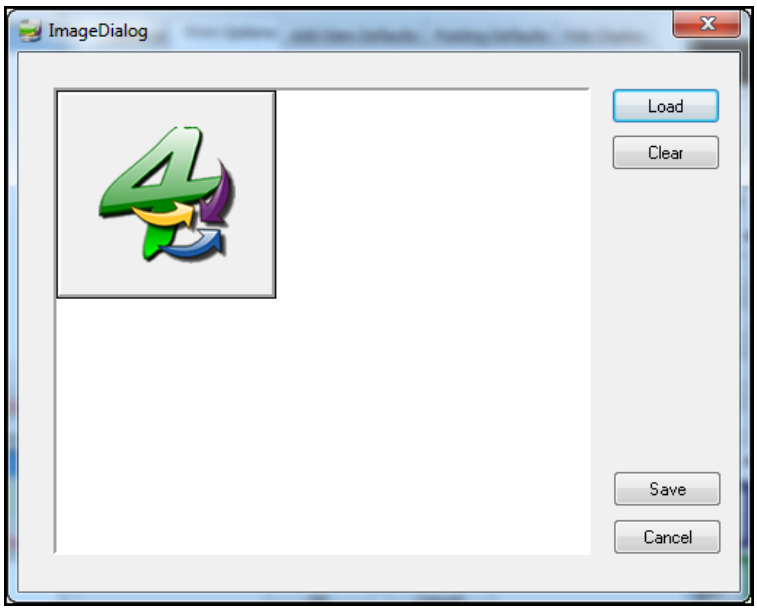
4. Click the **Load** button. Use the **Open** dialog to locate and select the image on your computer.

Copyright 2010, Resaleworld.com, Inc.

NOTE: *All logos must be in bitmap (.bmp) format. No other image formats are supported.*



5. Click **Open**. The selected image now appears in the Image Dialog.



6. Select the logo and click **Save**.
7. The **Image Dialog** will close. The selected logo is resized and will now print on your receipts.
8. When finished, click the **OK** button.

Related Topics

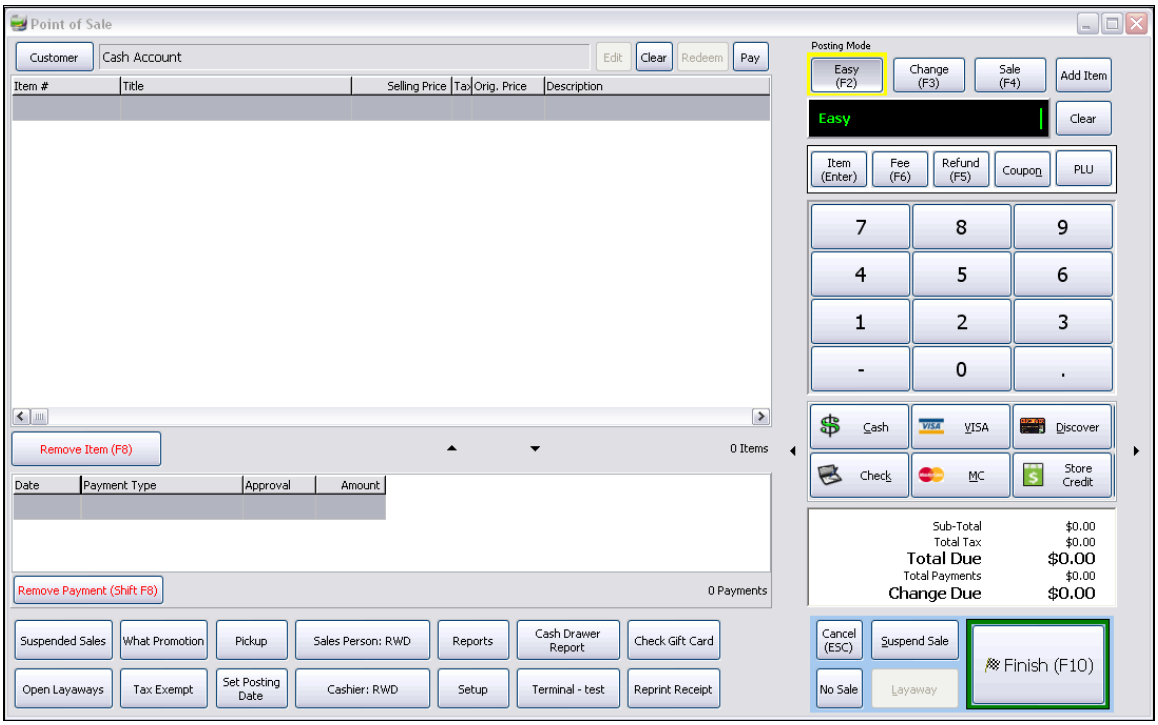
Set Up PoS Default Preferences

Set Up PoS Equipment

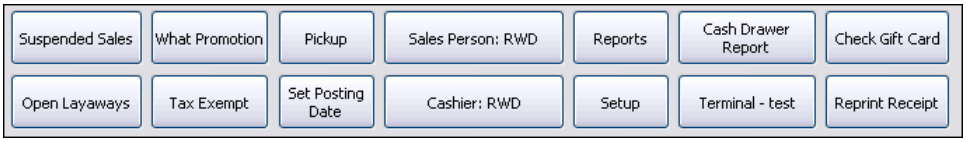
TOUCH SCREEN INTERFACE

PoS ➔ Overview ➔ Touch Screen Interface

Point of Sale can be toggled into a touch-screen mode that reorganizes the user interface into a more touch-screen friendly format. This mode can be enabled through the **Setup** menu, by selecting **Use Touch Interface**.



The Touch Interface displays a number pad on the screen, as well as buttons for many commonly used functions normally accessed through the drop-down menus.



More specifically, the Touch Interface buttons include buttons include the following:

Suspended Sales Opens the Suspended Sales list

Open Layaways	Opens the list of Pending Layaways
What Promotion	Allows a Promotion to be selected for the sale
Tax Exempt	Toggles Tax Exempt on/off
Pickup	Sets Delivery options for the sale
Set Posting Date	Allows items to be posted for a different date
Sales Person	Opens the Choose Salesperson screen
Cashier	Opens the User Login screen
Reports	Opens the Report Quick-Launch menu
Setup	Opens the normal PoS Setup Menu
Cash Drawer Report	Runs the Cash Drawer Total report
Terminal	Opens the Terminal Totals window
Check Gift Card	Checks a Gift Card's balance
Reprint Receipt	Opens the Reprint Receipt window

Many of the windows opened by the above functions are slightly modified versions of the corresponding windows opened when Touch Interface is not enabled. For example, any window where a number can be used for looking up an entry will include a number pad.

SELL ITEMS FOR REGULAR PRICE

Point of Sale Module ➔ *F2 - Easy Post*

In most cases items sell for the same price as printed on the price tag. For these items use the **Easy Post** method for transacting the sale.

When Automatic Markdowns are in effect, Easy Post will post the item for the correct, marked down price then appropriate.

Example: Assume Automatic Markdowns have been set to reduce the selling price by 25% after 30 days. An item consigned on June 1st and priced at $10.00 should thus be automatically marked down to sell for $7.50 as of July 1st. If Easy Post is used on or after July 1st, the item

Copyright 2010, Resaleworld.com, Inc.

will be posted as having sold for $7.50. For more information please see the section entitled Automatic Markdowns Overview.

To Transact (Post) A Cash Sale:

1. Start Point of Sale.
2. Press the **F2** key, or
   click on the **Easy (F2)** button.

   Tip: *The default posting method is Easy Post, so it is really only necessary to press <F2> or click on the Easy (F2) button if you are changing from another posting function such as Change Post, Sale Post, a payment method, etc.*
3. Scan the item number on the item's price tag, or
   using the keyboard type the account number, followed by a dash, then the item number, and then press the **Enter** key (for instance, for item 43 of account 129 type **129 – 43 <enter>**.
4. Continue scanning bar codes or entering item numbers from the keyboard. Change to another posting mode (Change, Sale, or Refund) if necessary.
5. When all items have been posted, enter the amount received from the customer, then press the **C** (for **C**ash) key or click on the **Cash** button.
6. Press **F10** to Finish (complete) sale.
7. Press the **Y** key to print receipt.

To Transact (Post) A Check Sale:

1. Start Point of Sale.
2. Press the **F2** key, or
   click on the **Easy (F2)** button.
3. Scan the item number on the item tag,
   or type the item number using the keyboard, and then press the **Enter** key.
4. Continue scanning bar codes or entering item numbers from the keyboard. Change to another posting mode (Change, Sale, or Refund) if necessary.
5. When all items have been posted, enter the amount received from the customer, then press the **K** (for Chec**K**) key or click on the **Check** button.
6. Enter the check number or customer's license number, and then press the **Enter** key.

Copyright 2010, Resaleworld.com, Inc.

7. Press **F10** to Finish (complete) sale.
8. Press the **Y** key to print receipt.

To Transact (Post) a Credit Card Sale:

1. Start Point of Sale.
2. Press the **F2** key, or
   click on the **Easy (F2)** button.
3. Scan the item number on the item tag,
   or type the item number using the keyboard, and then press the **Enter** key.
4. Continue scanning bar codes or entering item numbers from the keyboard. Change to another posting mode (Change, Sale, or Refund) if necessary.
5. When all items have been posted, enter the amount received from the customer, then press the **O** (for **O**ther) key or click on the **Other** button.
6. Choose the type of Credit Card from the list and click **OK**.
7. Press **F10** to Finish (complete) sale.
8. Press the **Y** key to print receipt.

Related Topics

Sell Items at a Discounted Price

Sell an Item at a Percentage Discount

Refunding a Sale

CHANGING THE SELLING PRICE OF AN ITEM

PoS Module → F3 - Change Post

Use Change Post to change the price of an item by a specific dollar amount. For instance, an item with the price of $10.00 on the price tag crossed out and replaced with $7.00.

Change Post may also be used to change an item's selling price by a percentage (e.g. 20% off during a sale), however, it is more convenient to use **Sale Post** instead. For more information on Sale Post please see the section entitled Sell an Item at a Percentage Discount.

To Post A Sale Requiring A Change In The Selling Price

1. Start Point of Sale.
2. Press the **F3** key or click on the **Change (F3)** button.
3. The **Calculate Consignor Net on Original Price?** dialog will display. This dialog only pertains to consigned items. The term **Net** refers to the amount the consignor receives.
    a. Select **Yes** to pay the client (consignor) based upon the original asking price.
    b. Select **No** to pay the client (consignor) based upon the new, changed price. (The default is No.)

    ***Note**: the Net will change after the changed selling price is entered.*

    Example: An item is originally priced for $10.00. The consignment split is 50% to the client. Using Change Post you reduce the price from $10.00 to $8.00. Answer **Yes** to **Calculate Net on Original Price** and the client will receive $5.00 (50% of the original price of $10.00). Answer **No** to **Calculate Net on Original Price** and the client will receive $4.00 (50% of the actual selling price of $8.00.)
4. Next, either:
    a. Scan the item number on the price tag, or
    b. Use the keyboard to type in the account number, followed by a dash, then the item number; then press the <**Enter**> key.

    Example: For item 43 of account 129, type **129-43** <**enter**>.
5. Enter the new price in the **Selling Price** field, then press **Enter**.
6. Note the amount in the **Net to Consignor** field has been adjusted automatically. You may change this amount, however, doing so should not be necessary if your answer to **Calculate Net on Original Price** was correct.
7. Press <**Enter**> twice.
8. Continue posting items in Change Post mode by scanning bar codes or entering item

Copyright 2010, Resaleworld.com, Inc.

numbers from the keyboard. Change to another posting mode (**Easy**, **Sale**, or **Refund**) if necessary.

9. When all items have been posted, enter the amount received from the customer and select the payment method (cash, check, credit card, etc.).
10. Press **F10** or click on the **Finish** button to complete the sale.
11. Enter **Y** to print receipt, and then press the **Enter** key twice.

Related Topics

Post an Easy Sale

Sell an Item at a Percentage Discount

Post a Refund

Sell an Item at a Percentage Discount

PoS Module → F4 - Sale Post

Use this procedure to ring a sale for an item that you want to discount by a specific percentage. This is useful when you have items on sale and wish to take a percentage off the item. If items in your store are reduced by 25% for a holiday sale, for example, this procedure is ideal.

To Post Sales At A Discount:

1. Press the **F4** key, or

   Click on the **Sale (F4)** button. The **Discount Percent** dialog will display.
2. Enter the sale percent in the **Discount Percent** field.
3. The three check boxes appearing under the Discount Percent field affect only consigned items.

Copyright 2010, Resaleworld.com, Inc.

a. Do not check the **Calculate Sale Price on Original Price** box - leave it blank.

b. Check the **Override Preset Nets** box to discount a preset net to client by the sale price.

Example: If an item is priced at $500.00 with a preset net of $350.00 and the item sells at a 20% discount, the new selling price is $400.00 and the new net to consignor is $280.00. If you do not check this box, the new selling price is still $400.00 and the net to consignor remains $350.00.

c. Check the **Calculate Net on Original Price** to calculate the net amount paid to the consignor based on the original price of the item.

4. Scan the bar code on the item tag, or

   Using the keyboard type the account number, followed by a dash, then the item number, and then press the **Enter** key (for instance, for item 43 of account 129 type **129 - 43 <enter>**.

5. Enter the amount received from the customer, and then select the payment method (cash, check, etc.).

6. Press **F10** or click on the **Finish** button to complete the sale.

7. Press the **Y** key to print a receipt.

Related Topics

Post an Easy Sale

Change Selling Price

Post a Refund

Set Up PoS Default Preferences

REFUNDS

PoS Module → F5 - Refund

When an item is returned by a customer, a **Refund** is issued. Using Refund in PoS will calculate the amount due to the customer (including tax), adjust the Cash Drawer balances, and return the item to inventory by changing the item's status from Sold to Available .

To Refund Items To A Customer:

1. Start Point of Sale.
2. Use the keyboard to type the account number, a dash, and the item number. Do NOT press the <**Enter**> key at this point - see step 3.

   Example: For item 43 of account 129, type **129 - 43**.
3. Press the **F5** key, or click on the **Refund (F5)** button.
4. Continue refunding items using steps 2 and 3 in order, and/or posting items using Easy, Change and/or Sale Post.
5. When all items have been posted, enter the amount received from the customer and select the payment method (cash, check, etc.). **If the transaction requires returning money to the customer, enter a negative amount using the hyphen (dash) key (located next to the 0/zero key),** followed by the method of payment (cash, credit card, etc.)

   Example: if the customer is owed $10.55 in cash, type **-10.55C**.
6. Press **F10** or click on the **Finish** button to complete the refund.
7. Enter **Y** to print receipt.

> ***Note:*** *Sales that contain multiple identical retail items require items be refunded one item at a time. For example, if three identical earrings are sold, and they are retail items with the same account number and item number, then three separate refunds must be transacted.*

Related Topics

Post an Easy Sale

Change Selling Price

Sell an Item at a Percentage Discount

Copyright 2010, Resaleworld.com, Inc.

Post Non-Inventory Items

Use this procedure to ring sales of non-inventory items, such as key chains, gum, etc.

Non Inventory items, also known as **Fees**, must first be set up before they can be used. See the section entitled Set up the Fee List (which is part of PoS Set up) for more information.

To Post The Sale Of A Non-Inventory Item:

1. Enter the amount of the Fee, then either press the **F6** key, or

   Click on the **Fee (F6)** button.

2. Select the type of item (fee) from the **Fee Type** list.
3. Continue the sale process.

Related Topics

Set Up the Fee List

Add a Fee to a Sale

PoS Module → F6 - Fee

Examples of **Fees** include delivery fees, insurance, repair fees, etc. Fees may also be used to record sales of items that are not entered into inventory. For instance, low value trinkets or food sold at the sales counter such as children's costume jewelry, gum, and candy might not be worth inventorying, in which case using the **Fee** button will save time.

Copyright 2010, Resaleworld.com, Inc.

Note: *Fees must first be set up before they can be used. See Set up the fee list for more information.*

To Post a Fee:

1. Enter the amount of the Fee, then either press the **F6** key, or

   Click on the **Fee (F6)** button.

2. Select the type of fee in the **Fee Type** list

3. Continue the sale process.

Related Topics

Set Up The Fee List

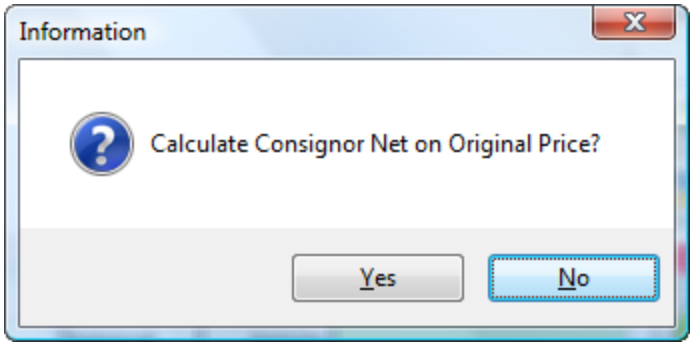
Post an Item as Tax Exempt

PoS Module → F3 - Change Post

Use this procedure to post an item as tax-exempt in a sale.

1. Press the **F3** key, or
   click on the **Change (F3)** button.

2. The **Calculate Consignor Net on Original Price?** dialog will display.



   This dialog only pertains to consigned items.

a. Select **Yes** to pay the client based upon the original asking price.

b. Select **No** to pay the client based upon the new, changed price.

> ***Note**: See Change Selling Price for more information about the Calculate Net dialog.*

3. Scan the item number on the item tag, **or**
   type the item number using the keyboard, and then press the **Enter** key.
4. Enter the selling price in the **Selling Price** field, then press **Enter**.
5. Note the amount in the **Net to Consignor** field has been adjusted automatically. Press **Enter**.
6. Place a check in the Tax Exempt check box to make the item tax exempt. Do this by either clicking on the box or pressing the **<Space Bar>**. Press **Enter**.
7. Continue posting items. Change to another posting mode (**Change**, **Sale**, or **Refund**) if necessary.
8. When all items have been posted, enter the amount received from the customer and select the payment method (cash, check, etc.).
9. Press **F10** or click on the **Finish** button to complete the sale.
10. Enter **Y** to print receipt, and then press the **Enter** key twice.

Related Topics

Post an Entire Sale as Tax Exempt

Changing the Selling Price of an Item

Post an Item as Tax Exempt

Tax Exempt Accounts

POST AN ENTIRE SALE AS TAX EXEMPT

Use this procedure to make all items in a sale tax exempt.

Copyright 2010, Resaleworld.com, Inc.

Note: *See the section entitled Tax Exempt Accounts for information about setting up Tax Exempt Accounts for clients.*

To Post an Entire Sale as Tax Exempt:

1. From Liberty Point of Sale's main menu select **File → Tax Exempt Sale**, or

   Type **<Ctrl> <T>** (Type a T while holding the Control key down.).

2. Transact the sale.

Related Topics

Tax Exempt Accounts

REMOVE AN ITEM FROM A SALE

PoS Module → Remove Item Button

Use this procedure to remove an item from a sale. You must remove the item before **Finishing** the sale.

To Remove an Item Before Posting a Sale:

1. Click on the item or payment to be removed to highlight it.
2. Click on the **Remove Item** button. The button is located just below the list of items, on the left side of the screen.
3. Confirm that the item should be deleted by selecting **Yes**.

Related Topics

Remove a Payment From a Sale

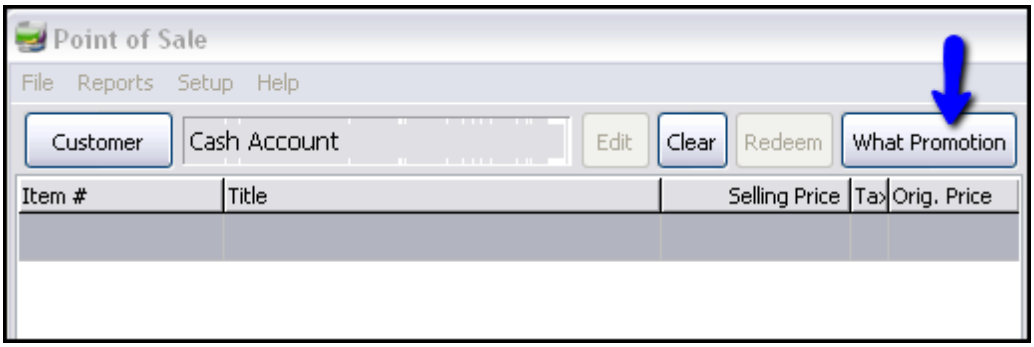
Copyright 2010, Resaleworld.com, Inc.

SELECTING PROMOTIONS

PoS Module → What Promotion button

Use this feature to tie a sale to a specific promotion, such as a radio ad or a mass mailing.

Select Promotion



The **What Promotion** button can be found at the top of the Point of Sale screen, to the right of the **Select Customer** area. Click this button to display a list of available promotions.

Selecting one of these options ties the sale to the selected promotion. The Promotion Summary Report can be run to show a breakdown of sales by promotion.

Related Topics:

Set Up Promotions

ACCEPT CASH PAYMENT

PoS Module → C - Cash

To Post a Cash Sale:

1. Post items.
2. If the customer tenders exact change, press the **C** key. If not, enter the amount received from the customer, and then press the **C** key. (Clicking on the **Cash** button will accomplish the same thing.)
3. Press **F10** or click on the **Finish** button to complete the sale.
4. Press the **Y** key to print a receipt.

ACCEPT A CHECK PAYMENT

PoS Module → Web Sale or Check Button

To Post a Check Sale for an Item Sold Offline

1. Post items.
2. If the customer provides a check for the exact amount of the sale, press the **K** key. If the

check does not equal the amount of the sale, enter the amount received from the customer, and then press the **K** key. (Clicking on the **Check** button will accomplish the same thing as pressing the K key.)

3. Enter the check number or customer's license number, and then press the Enter key.
4. Press **F10** or click on the **Finish** button to complete the sale.
5. Press the **Y** key to print a receipt.

To Post a Check Sale for an Item Sold Online

Use these steps when the customer sends a check in the mail or pays via COD:

1. Post the items(s).
2. Select the **Web Sale** button. (If the check does not equal the amount of the sale, instead enter the amount received from the customer, and then select the Web Sale button).
3. Press **F10** or click on the **Finish** button to complete the sale.
4. Press the **Y** key to print a receipt.

ACCEPT A CREDIT CARD PAYMENT

PoS Module → Appropriate Credit Card Button

To Post a Credit Card Sale

1. Post items.
2. When all items have been posted, click on the appropriate Credit Card button (Visa, MC {Master Card}, Amex, etc.). The amount of the sale will be automatically entered. If you accept a credit card that is not listed, see Set Up Payment Types for details on how to add the credit card as a Payment Type.

Copyright 2010, Resaleworld.com, Inc.

3. Press **F10** or click on the **Finish** button to complete the sale.
4. Press the **Y** key to print receipt.

Related Topics

Set Default Credit Card Software

Set Up Payment Types

ACCEPTING COUPONS

Coupons are treated like an item with a negative amount, and so appear in the Items area of the PoS screen.

To Accept a Coupon:

1. In PoS, enter the amount of the Coupon.
2. Click on the **Coupon** button.
3. Continue transacting the sale.

GIFT CERTIFICATES

Gift Certificates are treated as a type of payment, and so appear in the Payments area of the PoS screen.

Copyright 2010, Resaleworld.com, Inc.

To Take a Gift Certificate for Payment Toward a Sale:

1. In PoS, enter the amount of the Gift Certificate.
2. Click on the **Gift Certificate** button.
3. Continue transacting the sale.

SELL A GIFT CARD

PoS Module → Fee (F6) button → Gift Card

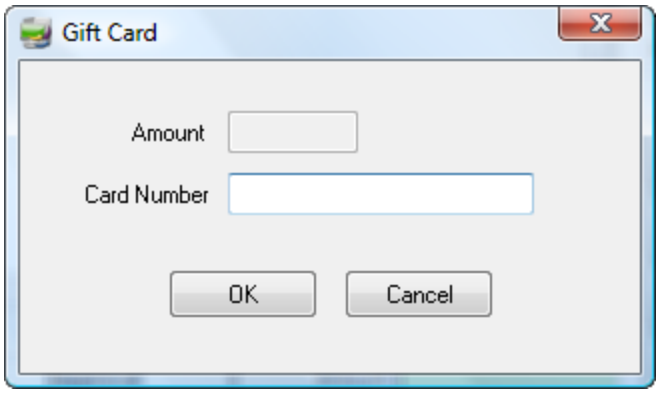
1. In the PoS Module, enter items as usual.

Item #	Title	Selling Price	Taxable	Orig. Price	Description
1-102765	Gap Jacket	$20.99	*	$20.99	Men's Large Denim Jacket (Gap)
1-102766	Levis Jeans	$13.99	*	$13.99	Men's Jeans - 36 x 32

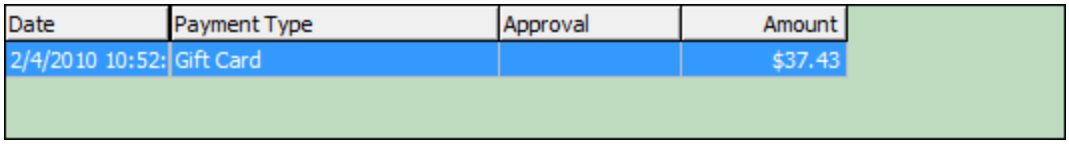
2. Click the **Gift Card** payment type button.

3. The **Gift Card** window will display and prompt you to enter/swipe/scan the gift card

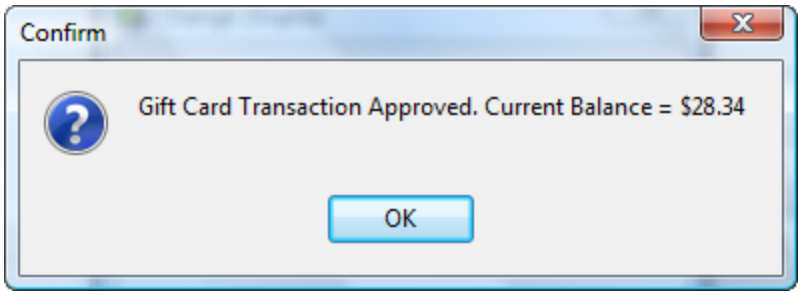
number.



4. Click **OK**. The payment will display, assuming the gift card's balance was enough to cover the Total Due.



5. Click **Finish**. Liberty will display the remaining balance on the card.



Related Topics

Sell a Gift Card

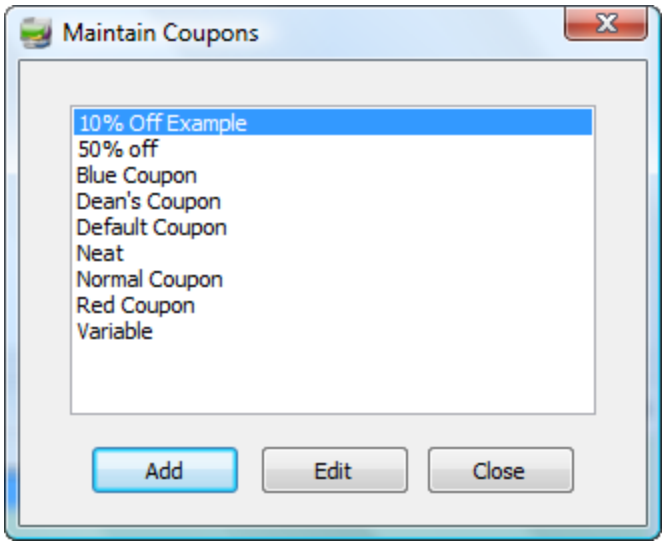
Additional Gift Card Information

USING COUPONS IN POS

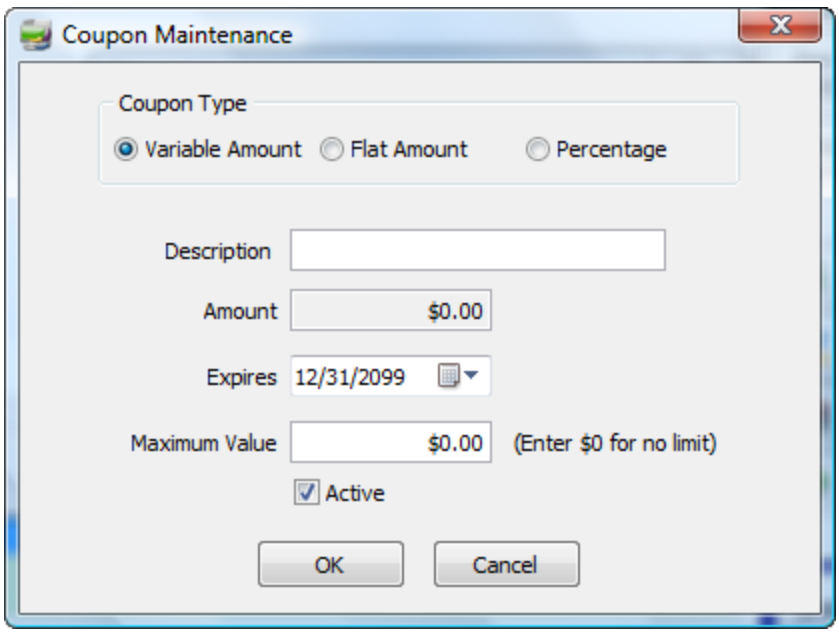
PoS ➔ *Setup* ➔ *Maintain Coupons*

Setting Up Coupons.

1. In the PoS, click on **Setup > Maintain Coupons**. The Maintain Coupons dialog displays.



2. Click on the **Add** button. The Coupon Maintenance dialog displays.



This screen will allow you to specify the coupon type, description, amount, expire date, and maximum value.

3. Use the **Coupon Type** radio buttons to select the type of coupon you are creating:

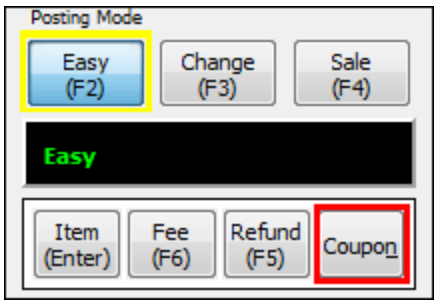
Copyright 2010, Resaleworld.com, Inc.

- **Variable Amount -** User must enter the dollar amount of the coupon each time it is redeemed.
- **Flat Amount** - Coupon is for a specific amount, such as $1.00, $2.00, $3.00 etc.
- **Percentage** - Coupon for specified percentage off the purchase, such as 5%, 10%, 15% etc.

4. Enter a **Description** for the coupon you are creating.
5. Use the **Amount** field to enter the value of the coupon, based on the selected Coupon Type.
6. Use the **Expires** field to select the date on which this coupon will expire.
7. The **Maximum Value** refers to the highest amount to which this coupon can be applied. For example, if someone purchases $500.00 worth of items and the coupon has a $200.00 max value, the 10% discount is only applied to the first $200.00.
8. Use the **Active** check box to indicate that this coupon is now active in the system. If this field is not checked, the coupon cannot be used.
9. Click **OK** to save your changes and exit.
10. Click **Close** on the Maintain Coupons dialog.

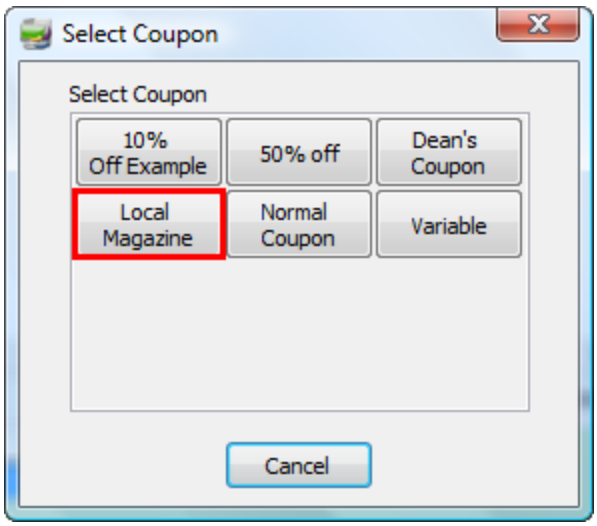
Apply a Flat Amount or Percentage Coupon

1. To use the new coupon, ring up the sale in PoS as usual.
2. In the Posting Mode section, click the **Coupon** button.



3. The Select Coupon dialog displays. Select the coupon you want to apply.

Copyright 2010, Resaleworld.com, Inc.



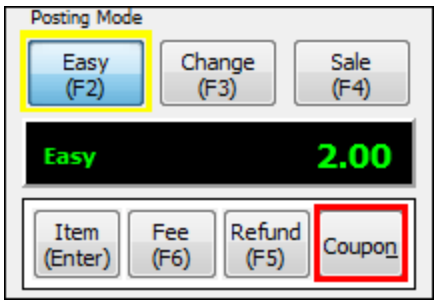
4. The coupon is applied to the sale and the amount is deducted from the total.

Item #	Title	Selling Price	Taxable	Orig. Price	Description
1-102769	Gap Jeans	$12.59		$13.99	Men's Dark Stonewash - 36 x 32
1-102770	Tommy Hilfiger Short	$9.89		$10.99	Men's XL Cargo Shorts - Khaki
n/a	Coupon	($2.25)		($2.25)	

Note: *Be sure to enter the items into PoS prior to clicking on the coupon button and selecting your coupon option.*

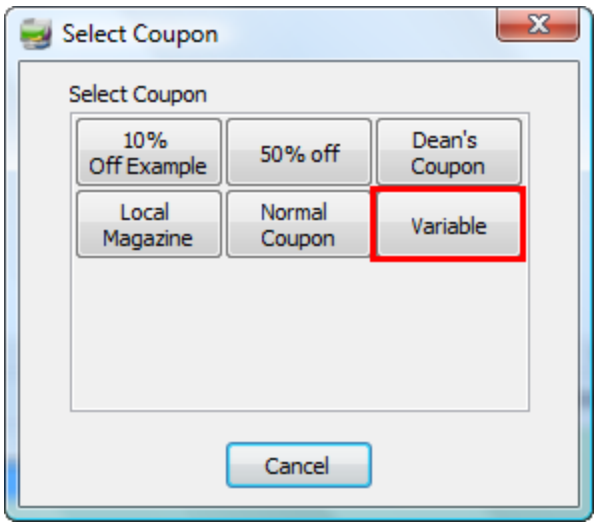
Apply a Variable Amount Coupon

1. To use the new coupon, ring up the sale in PoS as usual.
2. In the Posting Mode section, enter the amount of the discount and click the **Coupon** button.



3. The Select Coupon dialog displays. Select the **Variable** coupon button.

Copyright 2010, Resaleworld.com, Inc.



4. The coupon is applied to the sale and the amount is deducted from the total.

Item #	Title	Selling Price	Taxable	Orig. Price	Description
1-102771	Gap Jeans	$13.99	*	$13.99	Men's 36 x 32
n/a	Coupon	($2.00)		($2.00)	

Note: *Be sure to enter the items into PoS prior to clicking on the coupon button and selecting your coupon option.*

REMOVE A PAYMENT FROM A SALE

PoS Module → Remove Payment Button

Use this procedure to remove a payment from a sale. You must remove the payment before **Finishing** the sale.

To Remove a Payment Before Posting a Sale:

1. Click on the item or payment to be removed to highlight it.
2. Click on the **Remove** button. The button is located just below the list of payments, on the left side of the screen.
3. Confirm that the payment should be deleted by selecting **Yes**.

Related Topics

Remove an Item From a Sale

ACCEPT A STORE CREDIT AS PAYMENT

PoS Module → Store Credit Button

If a client is owed money and wishes to make a purchase in your store, **Store Credit** can be used as the payment type. Using store credit as the payment type reduces the amount owed to the client by the amount of the sale. A record of the transaction is stored in the client's Transaction History. Use the procedure below to post a sale to an account holder's account balance.

> ***Note**: You can allow a client to use a greater amount for store credit than what is actually owed. This is recorded in the client's Transaction History and their balance will become negative.*

To Post a Sale for a Consignor Using Store Credit:

1. Post items.
2. Press the <**F9**> key, or

Copyright 2010, Resaleworld.com, Inc.

Click on the **Select** (Customer) button, located just left of the **Easy** button, or

Select **File** → **Select Account**.

3. Select the client account from which money is to be taken from the Customer Lookup dialog.
4. Select **OK**. Note that the amount owed to the client shows at the bottom of the sale screen.
5. Enter the amount of Store Credit being used, then select the **Store Credit** button.
6. Select additional Payment Methods if necessary.
7. Press **F10** or click on the **Finish** button to complete the sale. The Store Credit will be subtracted from the account selected in step 2. The transaction will appear in the account holder's Transaction History display.
8. Press **Y** to print a receipt.

Related Topics

View Transaction History

Split Tender Sale

Sometimes a customer will want to pay with more than one type of payment. For example, they may pay $30 in cash and $20 with a check. Use this procedure to post a sale with more than one payment method.

To Post a Sale With Multiple Payment Methods

1. Enter the items using **Easy**, **Change**, and/or **Sale** Post, etc.
2. Enter the amount received from the customer for the first payment type and select the payment method (Cash, Check, Visa, etc.).
3. Repeat Step 2 to enter subsequent payment methods. You may use as many payment

Copyright 2010, Resaleworld.com, Inc.

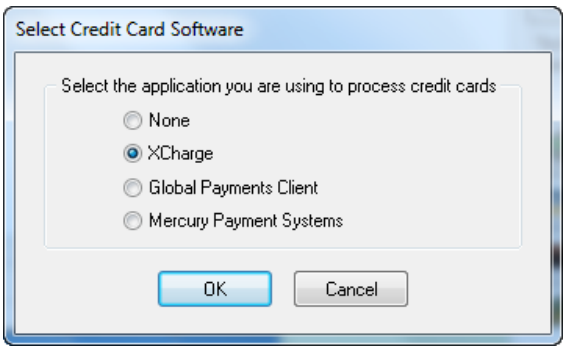
methods as necessary.

4. Press **F10** or click on the **Finish** button to complete the sale.
5. Press the **Y** key to print receipt.

SET DEFAULT CREDIT CARD SOFTWARE

In the Point of Sale Module, you can select a specific software to use for processing credit card charges. To select a specific software, in PoS, choose "Select Credit Card Software" from the **Setup** menu.

The **Select Credit Card Software** dialog displays:

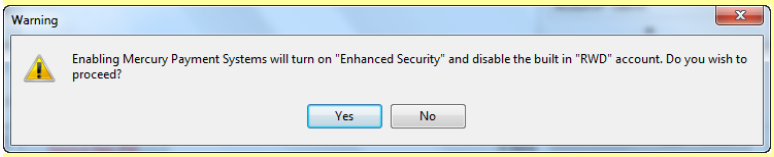


This dialog provides four options:

- None
- XCharge
- Global Payments Client
- Mercury Payment Systems

Select your preferred credit card software and click **OK**. This system will be used for any transaction using a Payment Type set as "credit card".

Note: *If "Mercury Payment Systems" you will be prompted to confirm the change and the following warning is displayed:*


Warning
Enabling Mercury Payment Systems will turn on "Enhanced Security" and disable the built in "RWD" account. Do you wish to proceed?
Yes
No

Related Topics

X-Charge Credit Card Authorization Setup

Mercury Credit Card Link Setup

X-Charge Credit Card Authorization Setup

PoS ➔ Setup ➔ Setup Credit Card Link

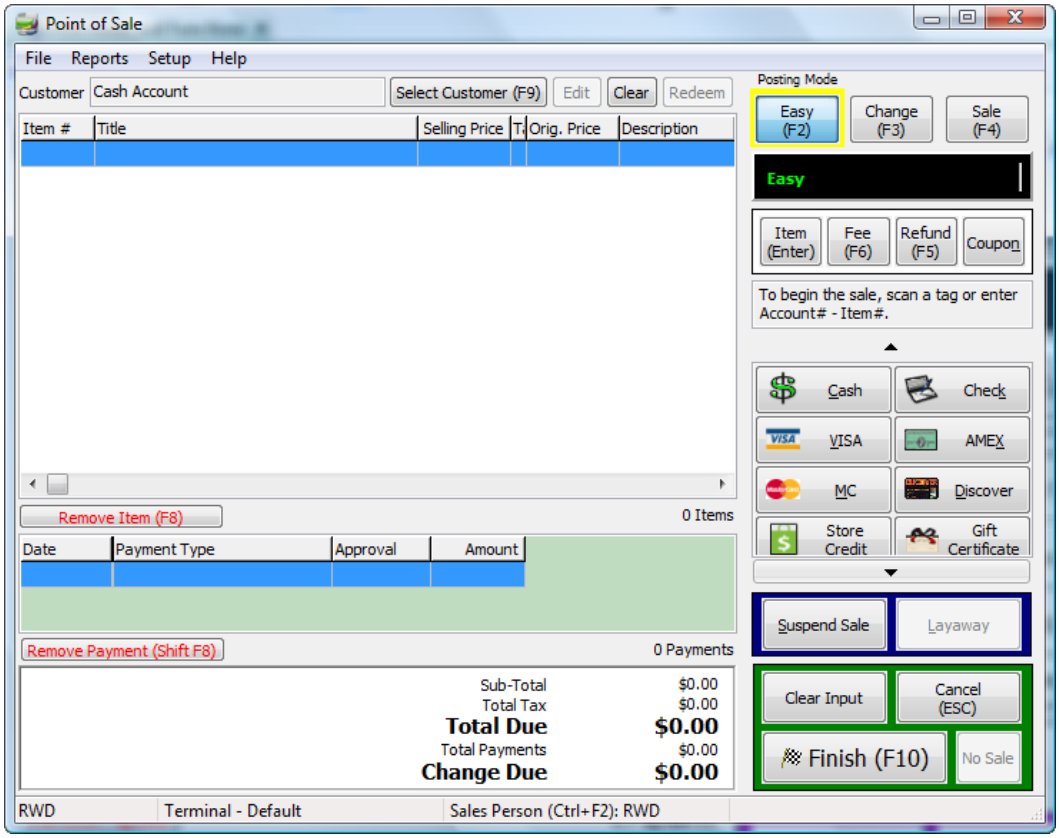
To Install X-Charge Credit Card Authorization Software

X-Charge is responsible for the configuration and installation of the X-Charge software for each client. Resaleworld strongly recommends contacting X-Charge directly at (XXX) XXX-XXXX to help you with this process.

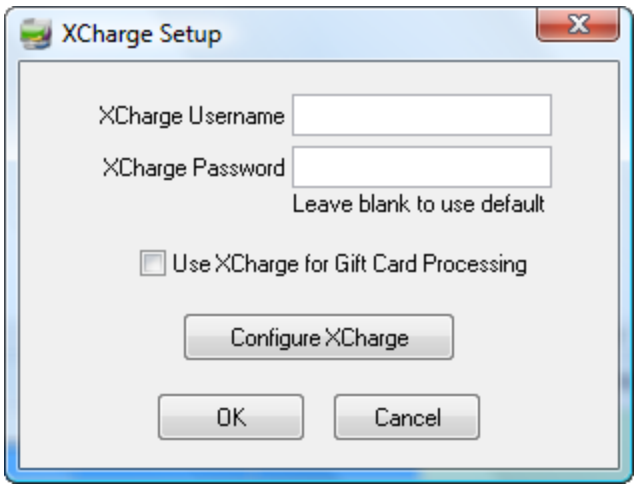
Note: *You must have X-Charge installed before setting up the below procedures.*

1. With Liberty4 Consignment running, select the **Point of Sale** button. The Point of Sale module will display.

Copyright 2010, Resaleworld.com, Inc.



2. From the Main Menu, select **Setup > Setup Credit Card Link**.
3. In the **XCharge Setup** dialog, enter the **Username** and **Password** for your XCharge account..



4. Select the **Use XCharge for Gift Card Processing** to indicate that you want to be use XCharge to process gift card payments.
5. Click **OK** when finished.

Related Topics

Set Default Credit Card Software

Set Up Payment Types

MERCURY CREDIT CARD AUTHORIZATION SETUP

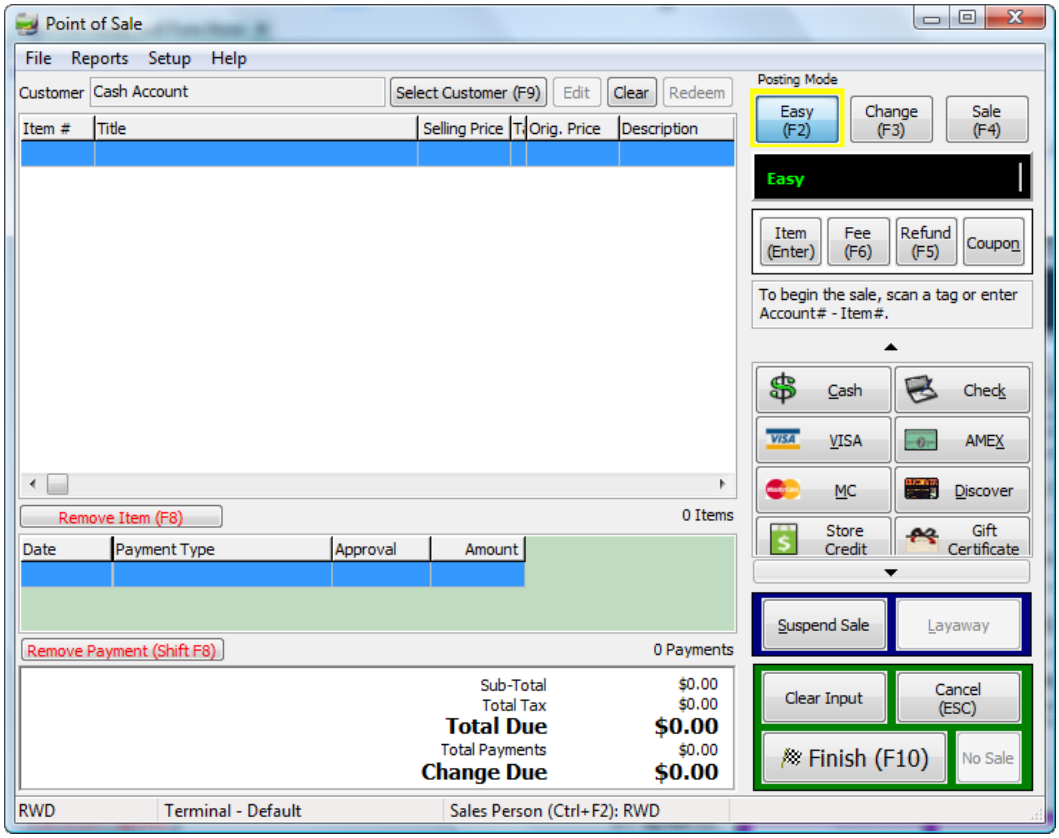
PoS ➔ *Setup* ➔ *Setup Credit Card Link*

Configure PoS to Use Mercury Payment Processing

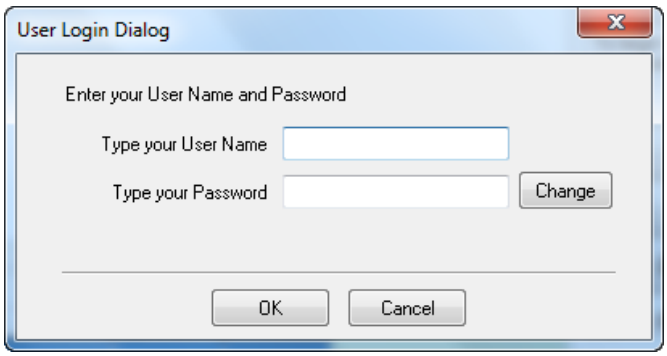
Once Mercury has been installed and selected as the default credit card software, it still must be configured to work the PoS Module.

1. With Liberty4 Consignment running, select the **Point of Sale** button. The Point of Sale module will display.

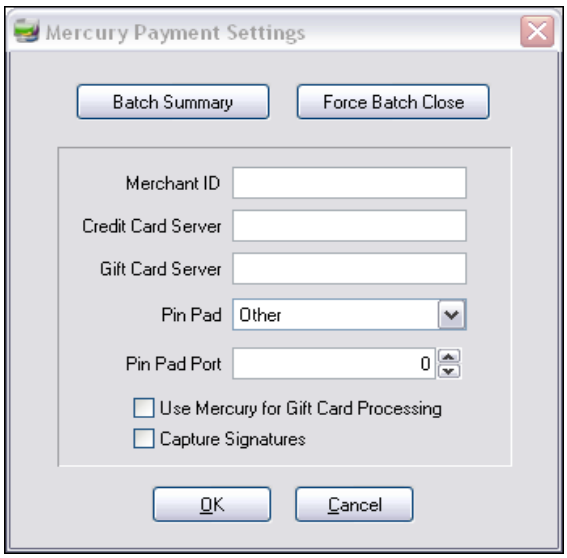
Copyright 2010, Resaleworld.com, Inc.



2. From the Main Menu, select **Setup > Setup Credit Card Link**.
3. In the **User Login** dialog, enter the **Username** and **Password** for your Liberty account..



4. The Mercury Payment Settings dialog displays:



5. Enter the **Merchant ID** and **Credit Card Server** assigned to you by Mercury.
6. The remainder of the settings are optional, such as selecting the Pin Pad type and port, and entering gift card processing information.
7. Click **OK** when finished.

Mercury Payment Processing is now set to be used as the default method for credit card payments. Mercury will now be used for any sales using a payment type designated as a credit card.

Related Topics

Installing Mercury Software

Set Default Credit Card Software

Processing a Sale in Mercury

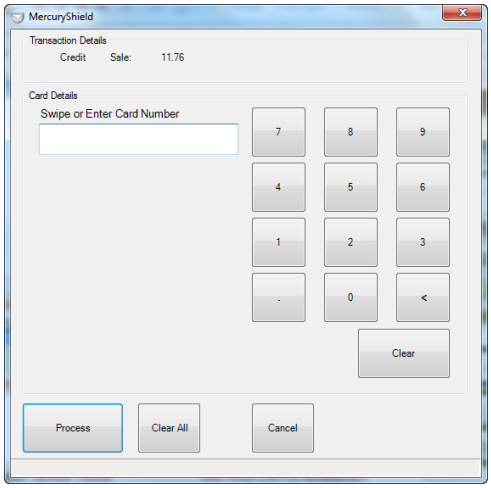
PROCESSING A SALE IN MERCURY

PoS → *Mercury Payment Processing* → *Transaction*

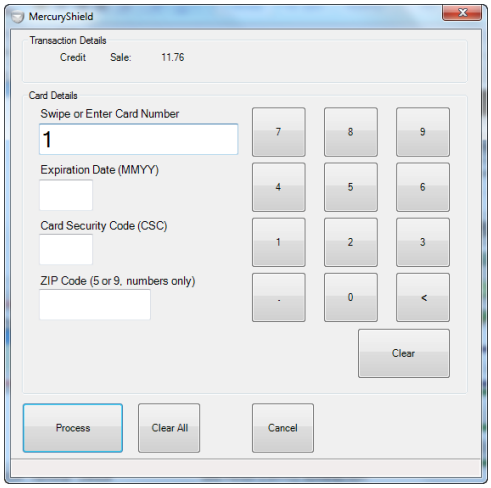
Copyright 2010, Resaleworld.com, Inc.

Processing a Transaction

1. Enter your sale in PoS and click the button for a credit card payment type.
2. The Mercury Processing Screen is launched automatically.



3. You can either swipe the credit card or enter the number manually. Swiping the card will automatically initiate a connection with Mercury's processing system. When entering the number manually, the window updates to display a few new fields relating to the credit card.



4. Enter the **Expiration Date**, **Card Security Code**, and billing **Zip Code** for the card.
5. Click the **Process** button when finished.
6. A credit card slip prints out automatically. Be sure to have your customer sign it!

Copyright 2010, Resaleworld.com, Inc.

7. You are returned to PoS, which will now show a completed sale. You'll have the option to print out a standard receipt.

Processing Partial Credit Card Payments

In a typical sale involving a credit card, you will be charging the total amount due. However, in the event that the amount to be charged to a credit card is different than the total amount due, you will have to complete one extra step.

Type in the amount you wish to charge to the card before pressing the payment method key. Once the payment key is pressed, a payment will be processed for the amount specified.

> *Note: PoS will not allow you to finish a sale that uses a card type set up for processing until the processing has successfully completed.*

Partial Approvals

For certain types of charge cards, such as a pre-paid Visa, the remaining balance on the card may be less than the full payment. In this situation, the transaction will be approved for the amount available. A pop-up box will alert the user and a payment will be entered for the approved amount. The sale can then be completed with a different payment method.

Cancel a Partial Payment

In the event that a sale needs to be canceled after partial payments have been entered, but before the sale has been finalized, the charges will need to be voided. This can be done manually by clicking on the payment to void and then clicking "Remove Payment" or **Shift** + **F8**. Alternatively, you can click the **Cancel** button.

A prompt will display asking the user to confirm that the sale should be voided. If a credit card payment was involved in the sale, a second prompt will ask the user if the card should be voided. Click "Yes" to void the transaction.

Related Topics

Accepting Debit Cards in Mercury

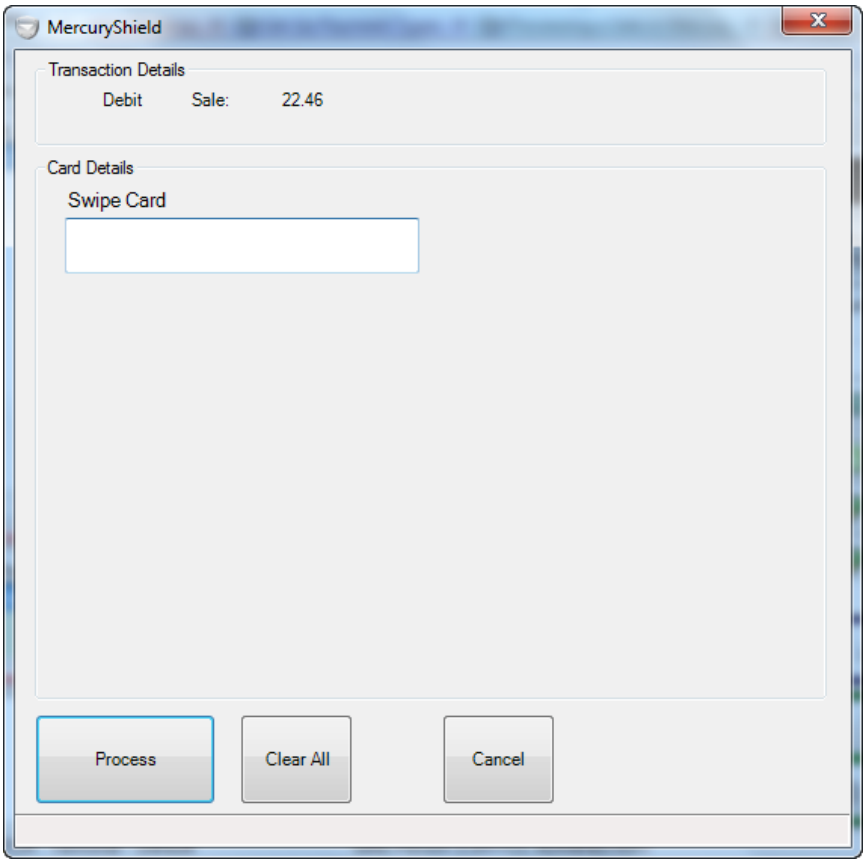
Copyright 2010, Resaleworld.com, Inc.

ACCEPTING DEBIT CARDS IN MERCURY

PoS ➔ *Mercury Payment Processing* ➔ *Transaction*

Processing Debit Cards works in much the same way as processing credit cards. The window for processing debit cards looks slightly different in that it is missing the number pad.

Debit cards must be swiped and cannot be typed in manually .



Once the card is swiped/entered, the customer will need to use the pin pad to enter their pin number.

Related Topics

Mercury Credit Card Link Setup

Processing a Sale in Mercury

PROCESSING GIFT CARD PAYMENTS IN MERCURY

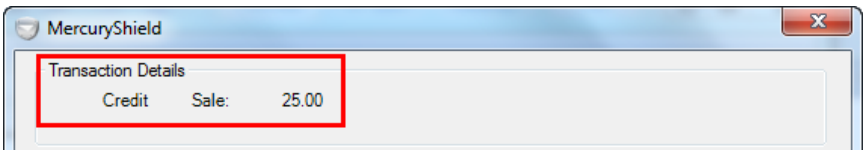
PoS ➔ *Mercury Payment Processing* ➔ *Transaction*

Payments being made using a gift card are handled in the same way as credit cards. The only difference is that the "Gift Card" payment method is used instead of the type of credit card. The gift card payment is processed immediately, and will either be approved, partially approved for the available balance, or declined if there are no funds available.

Using Gift Cards and Credit Cards in the Same Sale

In the event that one transaction involves using both a gift card and a credit card, take extra care to ensure that the correct cards are entered at the correct times.

Remember that using a gift card as a payment requires an immediate card swipe to check the available balance on the card. At the end of the sale, you will need to swipe both the credit card and gift card. The two cards must be swiped in the same order in which the payments were entered. Be sure to pay attention to the Transaction Details area near the top of the MercuryShield window, to ensure that you are swiping the right card (i.e. Credit or PrePaid).



Related Topics

Processing a Sale in Mercury

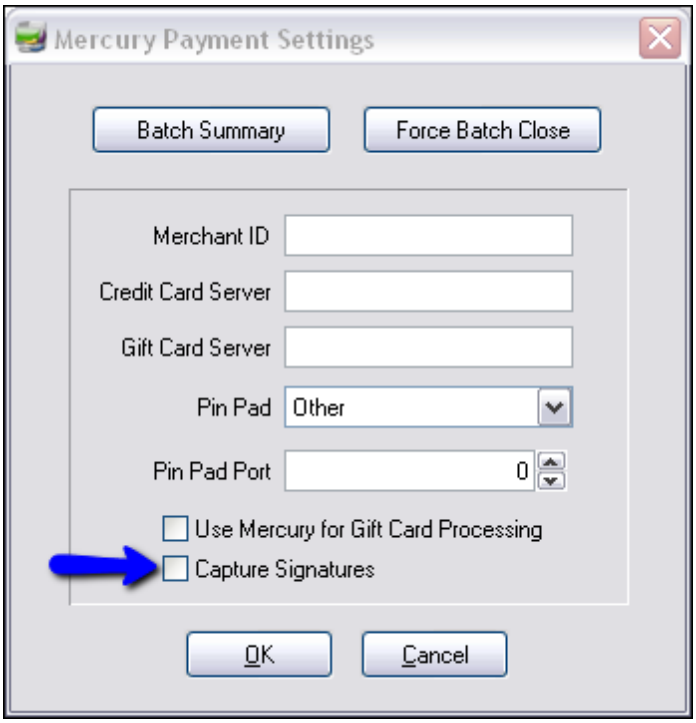
Loading Gift Cards in Mercury

Copyright 2010, Resaleworld.com, Inc.

Processing Using a Signature Capture Device

The built-in integration with Mercury Payment Systems allows for the use of the Magtek IPAD-S Signature Capture Device. This device is used in place of a cardswipe and pinpad. When the Signature Capture device is enabled, all on-screen prompts related to Mercury and card processing are removed. The only interaction necessary takes place on the screen of the device.

The Signature Capture Device can be enabled from the Setup Card Link screen when Mercury is already set to be the card processor:



COMMON ERROR MESSAGES IN MERCURY

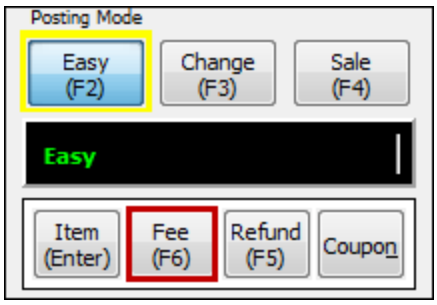
PoS → Mercury Payment Processing

There are a number of conditions that can result in a card processing failure. This topic lists a number of the most common errors, what they mean, and what caused the error.

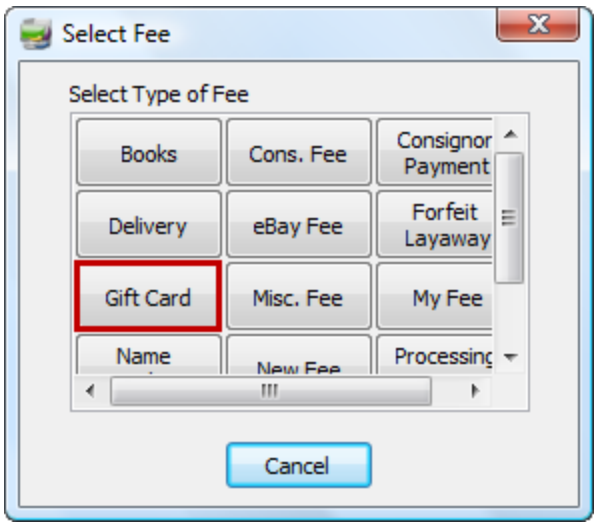
SELL A GIFT CARD

PoS Module → Fee (F6) button → Gift Card

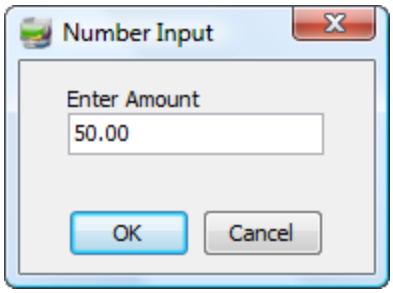
1. Launch the Point of Sale module.
2. Click the **Fee (F6)** button.



3. In the **Select Fee** window, click the **Gift Card** button.

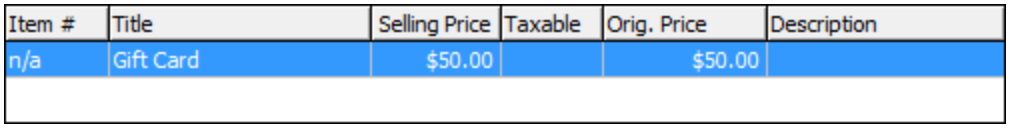


4. The **Number Input** window displays. Enter the dollar amount for the gift card being issued.



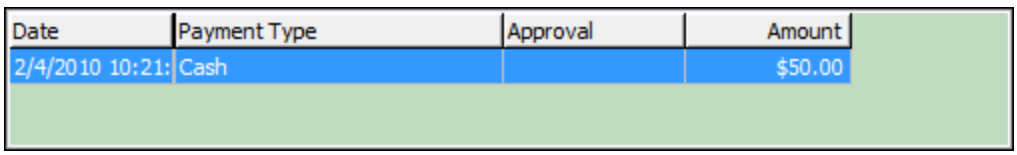
For example, enter "50" to sell a $50 gift card.

5. Click **OK**. You will now see Point of Sale has a line item for Gift Card, ready to be sold.



Item #	Title	Selling Price	Taxable	Orig. Price	Description
n/a	Gift Card	$50.00		$50.00	

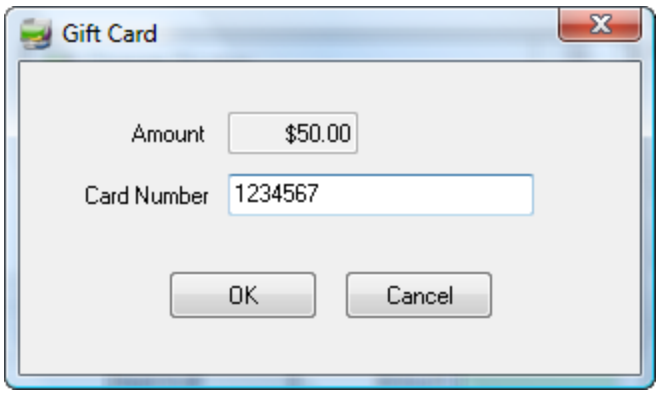
6. Select the form of payment your customer is using to purchase this gift card and enter the payment amount.



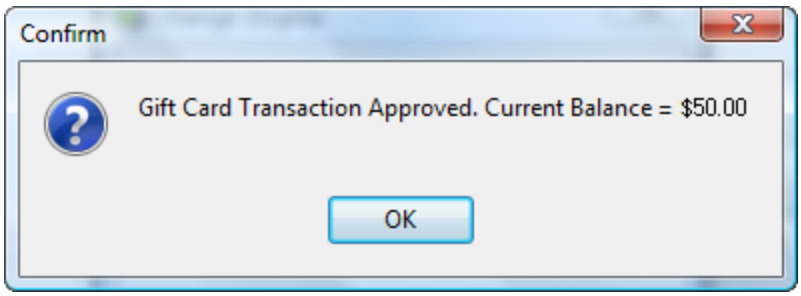
Date	Payment Type	Approval	Amount
2/4/2010 10:21:	Cash		$50.00

7. Click **Finish**.
8. In the **Gift Card** window, enter the **Card Number** you are issuing to your customer.

Copyright 2010, Resaleworld.com, Inc.



9. Click **OK**. You will see a Gift Card has been issued in the amount specified.



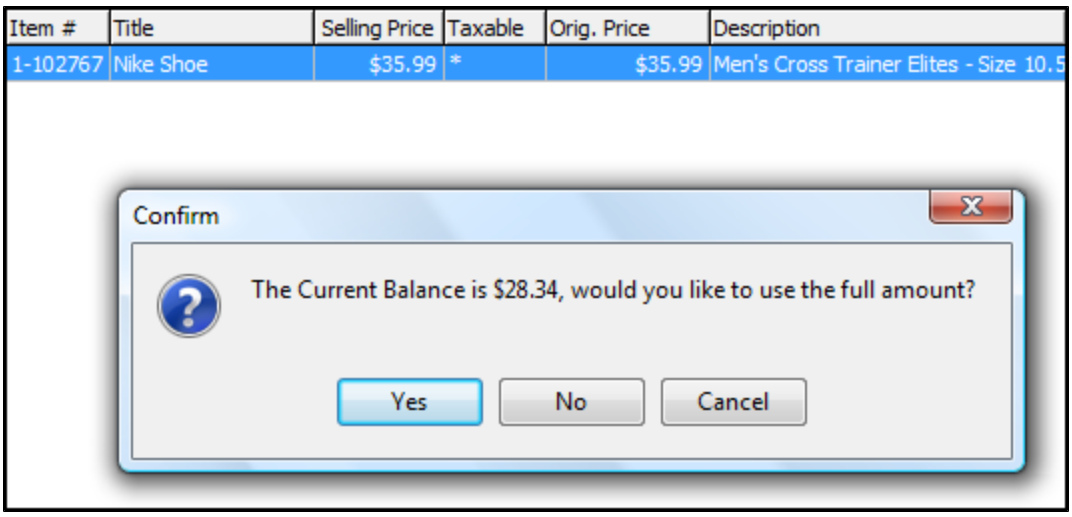
Related Topics

Accept Gift Card Payments

Additional Gift Card Information

ADDITIONAL GIFT CARD INFORMATION

If the balance on the Gift Card is not enough to cover the total due, Liberty will prompt you to confirm the balance.

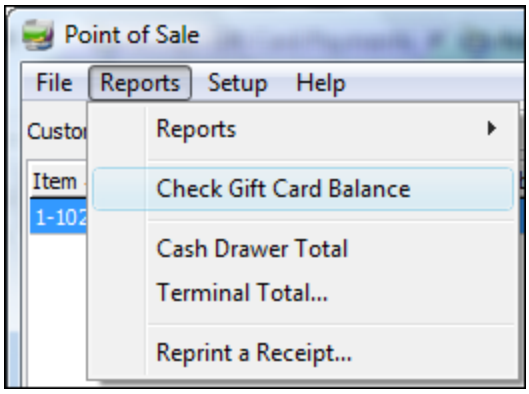


- Click **Yes** and Liberty will utilize the remaining balance.
- Click **No** and you will need to enter an additional form of payment or specify the exact amount to use from the Gift Card's balance.

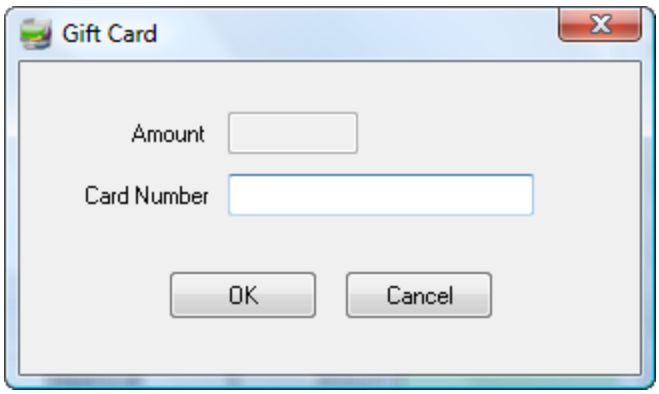
Check Gift Card Balance

Liberty allows you to check the remaining balance on any Gift Card. For example, if a customer wants to know how is left on the card before they begin shopping.

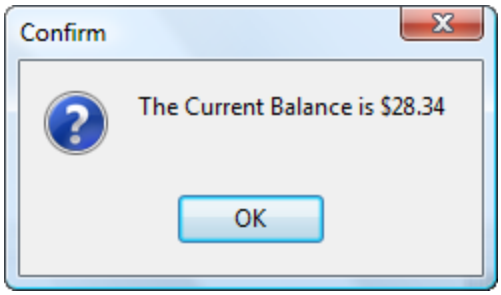
1. Click **Reports > Check Gift Card Balance**.



2. On the **Gift Card** screen, enter/swipe/scan the number of the card for which you are checking the balance.



3. Click **OK**.
4. The **Confirm** screen will display the current balance for the card.



Related Topics

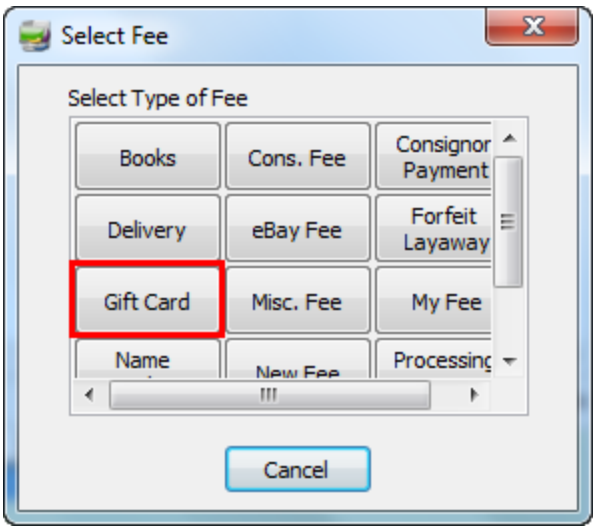
Sell a Gift Card

Accept Gift Card Payments

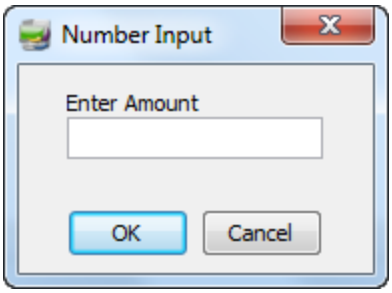
LOADING GIFT CARDS IN MERCURY

PoS ➔ Mercury Payment Processing ➔ Fee

To issue a gift card to a customer, the card will first need to be loaded with the correct amount of money. There is a special fee type for gift cards. Click the **Fee** button in PoS, and click on **Gift Card**.



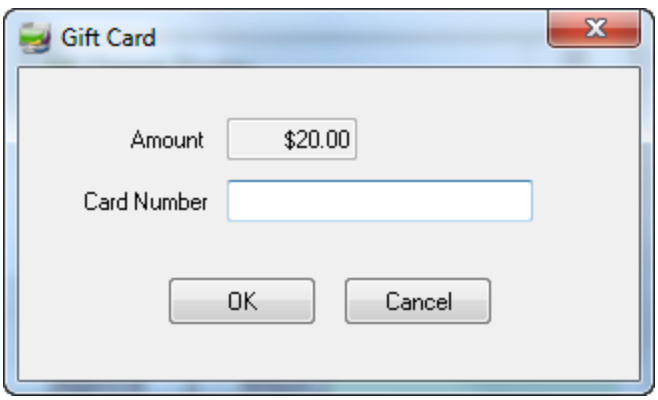
You will be prompted to enter the amount being loaded onto the Gift Card.



Click **OK** and complete the sale as if you were selling an item, using whatever payment method your customer chooses. Upon clicking **Finish**, you will receive a prompt asking if this is a new gift card.

> ***Note:*** *"Use Mercury for Gift Card Processing" must be selected in the Setup Credit Card Link section, along with the name of the gift card server.*

It is possible to reuse existing gift cards by adding value to the existing balance at any point. For both new cards and to add value to an existing card, you will be prompted to enter the number of the gift card.



Copyright 2010, Resaleworld.com, Inc.

Click **OK** and you will be prompted to swipe or enter the gift card. The gift card will be processed immediately, making the card live and the balance available for use.

Related Topics

Processing Gift Card Payments in Mercury

Processing a Sale in Mercury

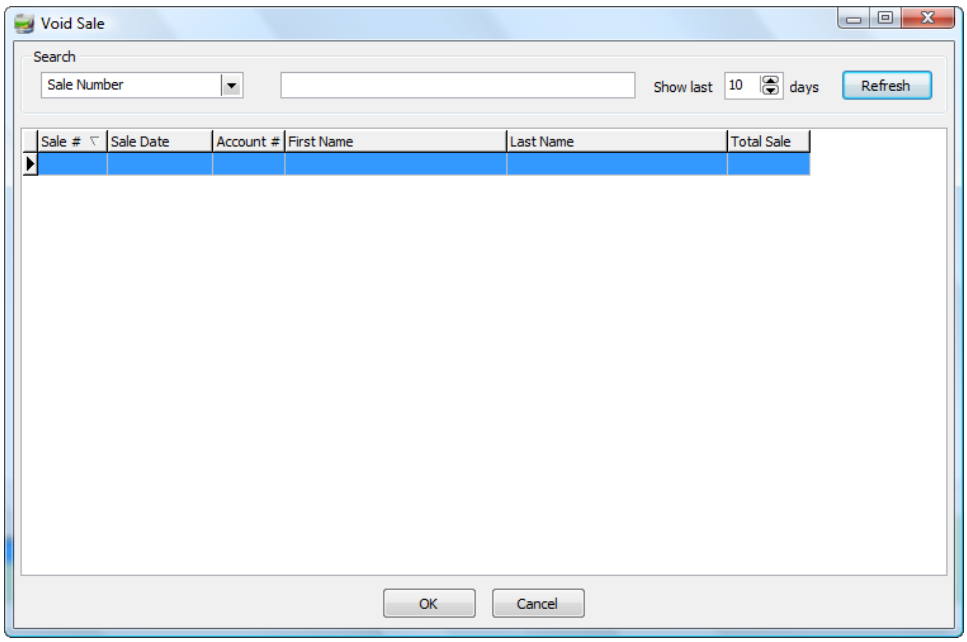
VOID A SALE

PoS Module → File → Void Sale

To Void a Sale:

WARNING: Voiding a sale will affect your accounting and should only be performed by a Store Manager.

1. In PoS, select **File** from the main menu, then **Void Sale**. The **Void Sale** dialog will display:



2. Find the Sale to be voided. Use the **Search** drop-down menu to select the best search parameter (Sale Number, Sale Date, etc.).
3. Highlight the Sale to be voided, then click **OK**. Answer **Yes** to the final prompt.

PAY A CLIENT IN POS

PoS Module ➔ *File* ➔ *Pay Client*

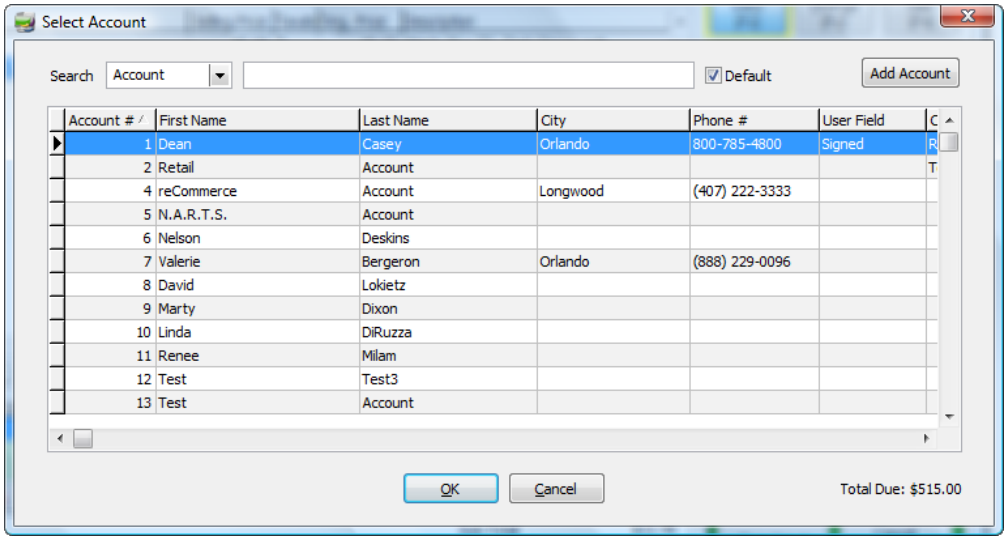
Use this procedure to pay just one client in the PoS Module. Once the payout has been posted, inventory items are updated in the **Transaction History** and the payouts are recorded in the account's **Payout History**.

> ***Note:*** *Items designated as consigned are payable only after they are sold. Items designated as purchased outright are payable immediately.*

Copyright 2010, Resaleworld.com, Inc.

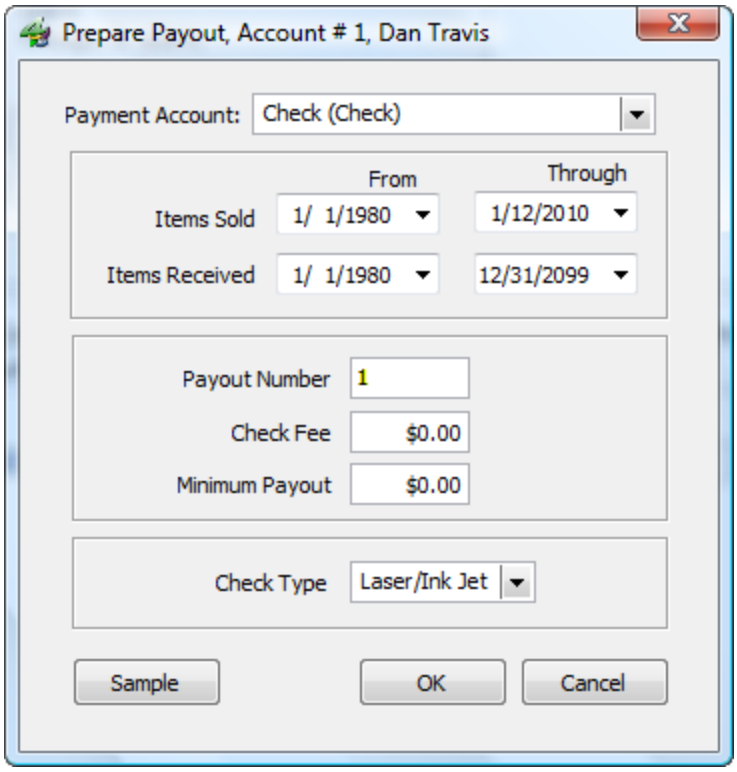
To Pay One Client:

1. In the PoS Module, select "Pay Client" from the **File** menu. The Select Account screen displays.



2. Select the account to use and click **OK**.

   The **Prepare Payout** dialog will display:



3. First, ensure the correct account is selected in the **Payment Account** drop-down. If you

are paying the client with a check, be certain **Check** or a checking account you have created is selected from the drop-down. If you are paying by Cash, be sure to select **Statement (Cash)**. For more information about Payment Accounts, see the section entitled Set Up Payment Accounts.

4. In the **Items Sold** fields (**From** and **Through**), enter the time period during which items must have sold in order for the client to be paid, then press <Enter>. To place a hold on a transaction or transactions so a consignor is not paid for a specific item at this time, see the section entitled Transaction History.

5. In the **Items Received** fields (**From** and **Through**), enter the time period during which items must have been received into inventory in order for the client to be paid, then press <Enter>.

6. In the **Payout Number** field, enter the payout number (if paying by check, use the check number), then press <Enter>.

7. If there is a fee assessed for payouts, enter it in the **Check Fee** field, then press <Enter>.

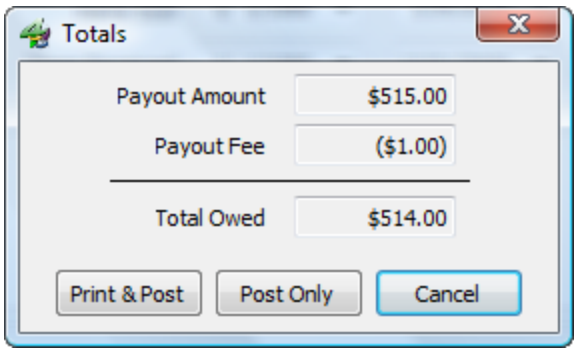
8. If there is a minimum payout amount, enter it in the **Minimum** field, then press <Enter>. (If the client is owed less than the amount entered no payment will be made.)

9. If paying by Cash, skip this step. If paying by check, select the type of check. **Dot matrix** checks only work in dot matrix printers. **Quicken** checks have a check at the top of an 8½ x 11 page, and two stubs below. **Laser/Ink Jet** checks have a check in the middle of an 8½ x 11 page, with a stub above and a stub below.

   (Contact Resaleworld to order checks for use with Liberty. Checks ordered from Resaleworld are guaranteed to work with Liberty. Checks ordered from other sources may not work. For more information, please see the section entitled Ordering Computer Checks from Resaleworld>.)

10. If you wish to print a sample check or cash statement to make sure paper has been properly placed in the printer, click on the **Sample** button.

11. When the parameters are correct and you are ready to print the payout, click the **OK** button. The **Totals** dialog will display:



12. Select **Print & Post** if you are printing a Computer Check or Cash Payout Statement. Select **Post Only** if you are hand writing a check. Select **Cancel** to cancel the process.

If you make a mistake, follow the instructions provided in the section entitled Reverse a Posted Payment.

Related Topics

Payouts Overview

Hold a Transaction

Assessing Fees to Accounts and Items

Add a Note to a Transaction

Change Payment Account for Multiple Accounts Simultaneously

TRACK SALES BY CUSTOMER

PoS Module → F9 - Account

Customer Look Up is a useful and profitable tool. Use this feature for tasks such as:

- To track sales by customer. See Liberty Reports Overview for more information.
- Ringing a sale for a client that is using Store Credit to make the purchase.
- Verifying that a consumer has not written a bad check to your store in the past.

To Look Up an Account:

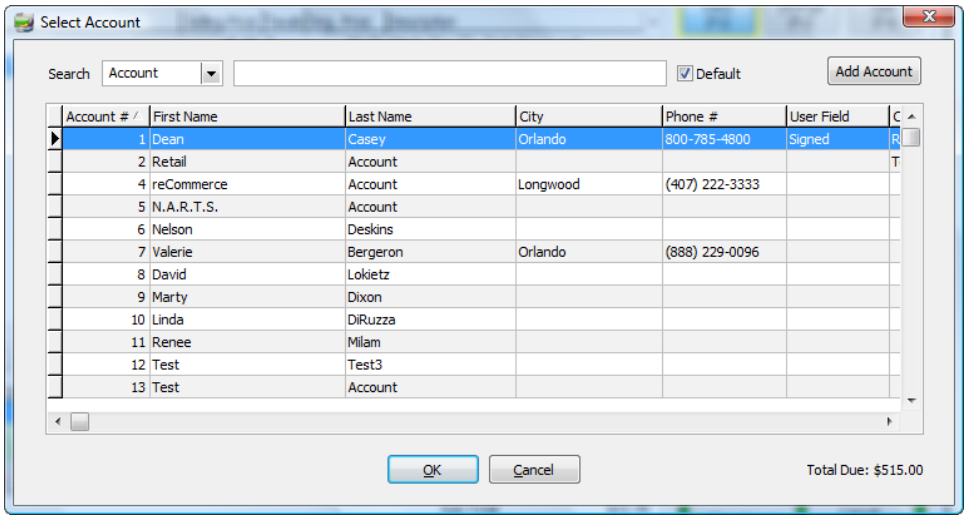
1. Start Point of Sale.
2. Press the <**F9**> key, or

   Click on the **Select** (Customer) button, located just left of the **Easy** button, or

   Select **File → Select Account**.

Copyright 2010, Resaleworld.com, Inc.

The **Select Account** dialog box displays:



3. To locate a specific account, use the **Find** field. To select which field to use for looking up the customer (last name, first name, phone number, etc.), click on the appropriate column header.

   Example: To find someone by last name, first click on the **Last Name** column header, then type the last name in the Find field.

4. With the account highlighted, click the **OK** button.

> ***Tip:*** *To reorder the fields in the Customer Lookup dialog, right click on the column header of the field to be moved, then drag the field to its new location.*

TRACK SALES BY EMPLOYEE

Users must log in when starting Point of Sale, and can be required to log in each time a sale is transacted. This lets you track sales by employee. Among the reasons to track employee sales are:

1. Track and pay sales commissions.
2. Security (reduce shrinkage).
3. Audit sales for customer service purposes.

Copyright 2010, Resaleworld.com, Inc.

To Track Sales by Employee

1. Set up User ID's for sales clerks.
2. From the Point of Sale Main menu, select **Set up** → **PoS Set up**.
3. On the **General** tab, put a check in the **Display logon prompt for each sale** check box. Select **OK**.
4. If necessary, during a sale you can change the Sales Clerk by typing **<Ctrl> <F2>** and selecting the **Sales Clerk** from the Sales Clerk dialog.
5. To tally an employee's sales, run an **End of Day - Sale Detail** report and specify the employee in the **Sales Person** field.

***Note**: The **Cashier** is the person ringing up the sale. The **Sales Clerk** is the person who makes the sale. The Cashier and Sales Clerk are not necessarily the same person. For example, stores that pay a commission for sales frequently have Sales Clerks making sales and Cashiers ringing up the sales.*

***Note**: When logging in for each sale, the **Sales Clerk** defaults to the same **User ID** as the **Cashier**.*

To Calculate Sales by Sales Person for Commissions

1. Start the **Reports Module** by selecting **Reports** → **Reports** from the Main Menu.
2. With **Sales** selected in the **Report Category** panel, select **Sales Commission** in the **Report Name** panel.
3. Set the **Sale Date** and **Sales Person** filters accordingly.
4. Run the report by selecting the **Print Preview** or **Print Report** button.

Related Topics

Set Up PoS Default Preferences

Liberty Reports Overview

Set Up Employee Access to Liberty

Copyright 2010, Resaleworld.com, Inc.

ADD AN ACCOUNT IN POS

PoS Module → *File* → *Add Customer*

To Add an Account From Within PoS

1. From the Main Menu in Liberty PoS, select **File** → **Add Customer**. The **Account Quick Add** dialog will appear.
2. Enter account information as needed and click **OK**.

Related Topics

Add an Account

Look Up an Account in Liberty PoS

EXPIRE POST

Consigned items may be set to **Expire** after a certain time period. **Expire Post** is an excellent revenue generating feature which many stores throughout the consignment industry take advantage of. Expire Post is set up with Price Codes.

When a Consigned Item is Posted as Expired

- The proceeds are not split between the store and the client.
- The entire purchase price goes instead to the store. In other words, the cost of the item becomes zero (0), which makes the entire selling price profit.

Copyright 2010, Resaleworld.com, Inc.

How Expire Post Works in PoS

When Expire Post is in effect for a consigned item, and the item sells after the consignment period has ended, the sales clerk is given the option whether or not to post the item as *Expired*. A dialog box with the message: **Would you like to post this item as expired?** appears after the item is posted.

- If the sales clerk responds **Yes**, then the item is posted as expired.
- If the sales clerk responds **No**, the item is posted as sold, not expired. The account holder receives their designated percentage according to the currently assigned price code.

Related Topics

Expired Items report in Liberty Reports

Define Price Codes

Undo Posting of an Item as Expired

UNDO POSTING OF AN ITEM AS EXPIRED

Use this procedure if you posted an item as expired by mistake.

To Undo Posting of an Item as Expired

1. Refund the sale. See the Refunds topic for more information.
2. Sell the item again, this time selecting "No" when asked **Would you like to post this item as expired?**.

Related Topics

Post a Refund

Expire Post

Define Price Codes

Copyright 2010, Resaleworld.com, Inc.

SUSPEND A SALE

PoS Module → Suspend Button

Use **Suspend Sale** when you want to ring another sale prior to finishing the current sale.

Example: Use Suspend Sale when a customer leaves their money in their car. Suspend their sale, help other customers in the meantime, and resume the suspended sale when the customer returns.

When you Suspend a sale, you are saving it in Liberty PoS. Items included in the sale cannot be sold to another consumer unless the suspended sale is canceled.

To Suspend a Sale

1. Click the Suspend Sale button at any time during the sale.

To Resume a Suspended Sale

1. Re-Scan the bar code of any item in the Suspended Sale, or

   Enter the item number of the item and press Enter.

2. Click "Yes" on the Confirm dialog asking if you want to recall the sale.

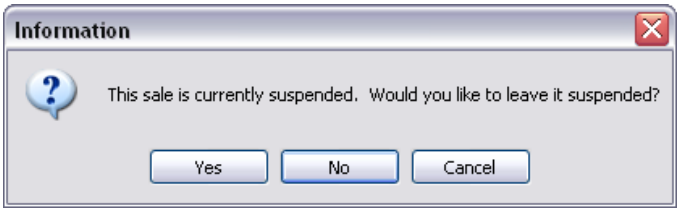
OR

1. On the PoS Main menu select **File → Suspend Sale Lookup**, or press the **<F12>** key.
2. Select the Suspended Sale you to be completed.
3. Click the **OK** button.
4. **Finish** the sale.

Copyright 2010, Resaleworld.com, Inc.

Cancel a Suspended Sale

To cancel a Suspended Sale, the sale must first be Resumed as described above. Once the sale has been opened, it can be canceled by clicking the **Cancel** button in the bottom right. The following message box displays:



- Click "Yes" to leave the sale suspended.
- Click "No" to cancel the Suspended Sale and release any items that were part of the sale.
- Click "Cancel" to returns to the current Suspended Sale.

QUICK ITEM ENTRY IN POS

PoS Module ➔ *File* ➔ *Add Item*

Use **Add** in **PoS Quick Item Entry** to add items to Liberty Inventory from Liberty PoS. This feature is useful if you have store inventory that you do not want to add to Liberty through the Item Entry window and do not plan to sell on the Web.

To Add Items From PoS Using Quick Item Entry:

1. From the main menu in Liberty PoS, click on **File**, and then **Add New Item**, or Type **<Ctrl> <Insert>** to open the **Item Quick Add** dialog box.
2. Enter information as needed. You must fill in the following fields to enter the item: Account, Date, Price and Description.

   To add a description using the **Quick Description Fill**, with your cursor in the

Description field, press the **F2** key. Select an item on the left that has the corresponding description you want in the **Description Text** field and press <Enter> twice or click **OK**.

3. Click on the **Save** button.

Related Topics

Create Quick Item Entry Descriptions

Set Up PoS Default Preferences

USING CATEGORY DISCOUNTS IN POS

PoS ➔ Setup ➔ Maintain Category Discounts

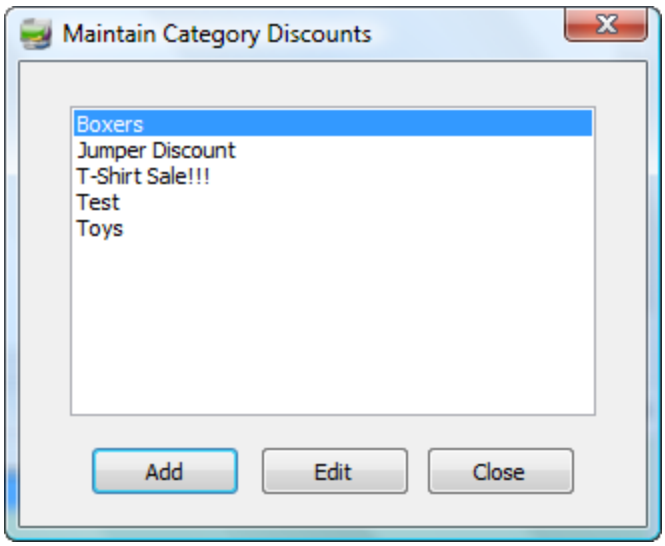
Liberty's Point of Sale module has a feature named Category Discounts. This feature can be found in the **Setup** menu in PoS.

Category Discounts allow you to put an entire range of items on sale, such as when you want to discount "all socks" or "all dresses". You can create an "all dresses are half-off" category and Liberty will discount these items automatically.

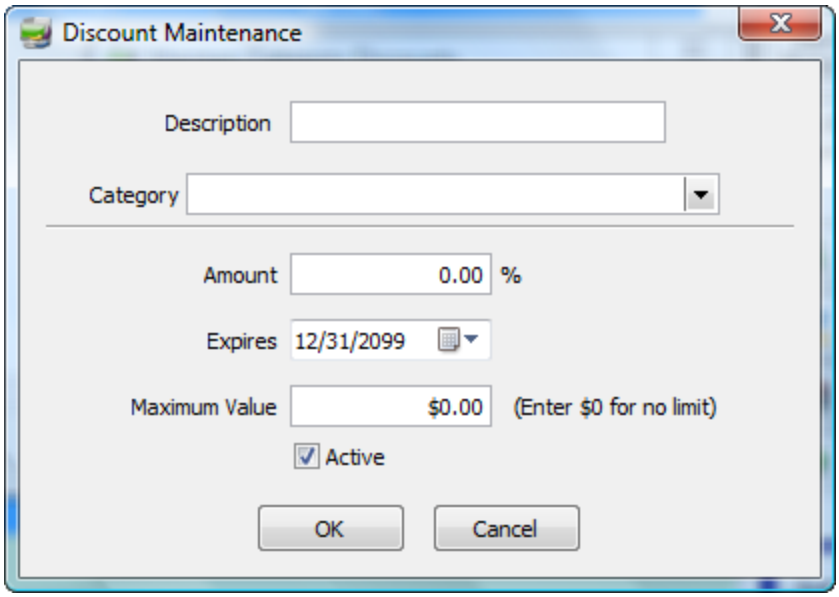
Setting Up Category Discounts

1. In the PoS, click on **Setup > Maintain Category Discounts**. The Maintain Category Discounts dialog displays.

Copyright 2010, Resaleworld.com, Inc.



2. Click the **Add** button. The Discount Maintenance dialog displays.



3. Enter a **Description** for the discount, such as 50% Off All Dresses.
4. Use the drop-down to select the **Category** that covers the items to which you want to assign a discount.
5. Specify the discount percentage in the **Amount** field.
6. Use the **Expires** field to set the expiration date for this discount. This field defaults to the year 2099, so the sale would run until then if you do not enter an expiration date. For example, if the sale is only for a weekend or a season, you can specify the date through which the sale would run.
7. Set a **Maximum Value** for this discount. For example, if you don't want a discount to generate more than $1,000 in discounts, you would enter $1,000 in this field.
8. Make sure the **Active** field is checked to begin using this discount in Liberty. You can

Copyright 2010, Resaleworld.com, Inc.

use this field to activate or deactivate sales as you wish, which allows you to re-use existing discounts with new parameters rather than creating new discounts each time.

9. Click **OK**.
10. Any time an item meeting the category's description is rung up in Liberty, the discount will automatically be applied. The discounted price for the item will display along with the original price.

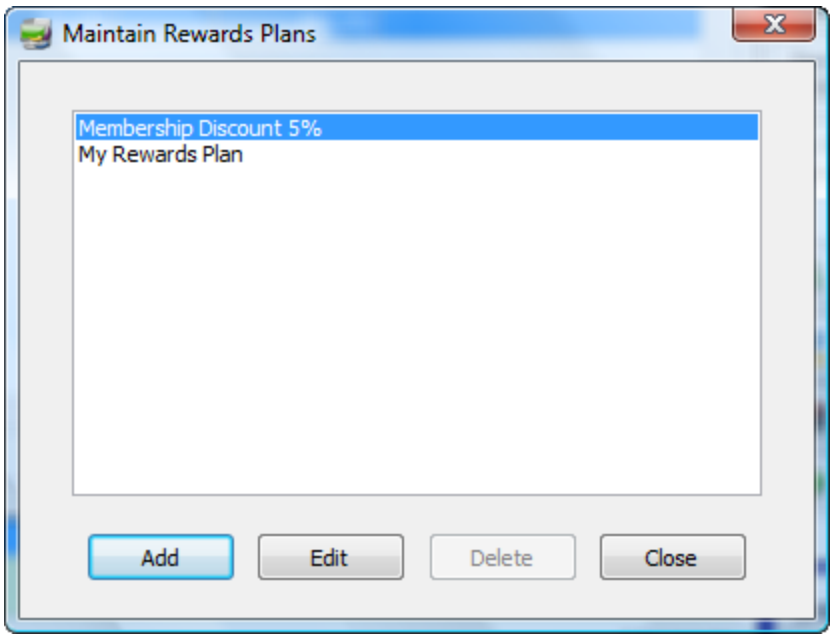
SET UP A REWARD PLAN

PoS ➔ Setup ➔ Maintain Reward Plans

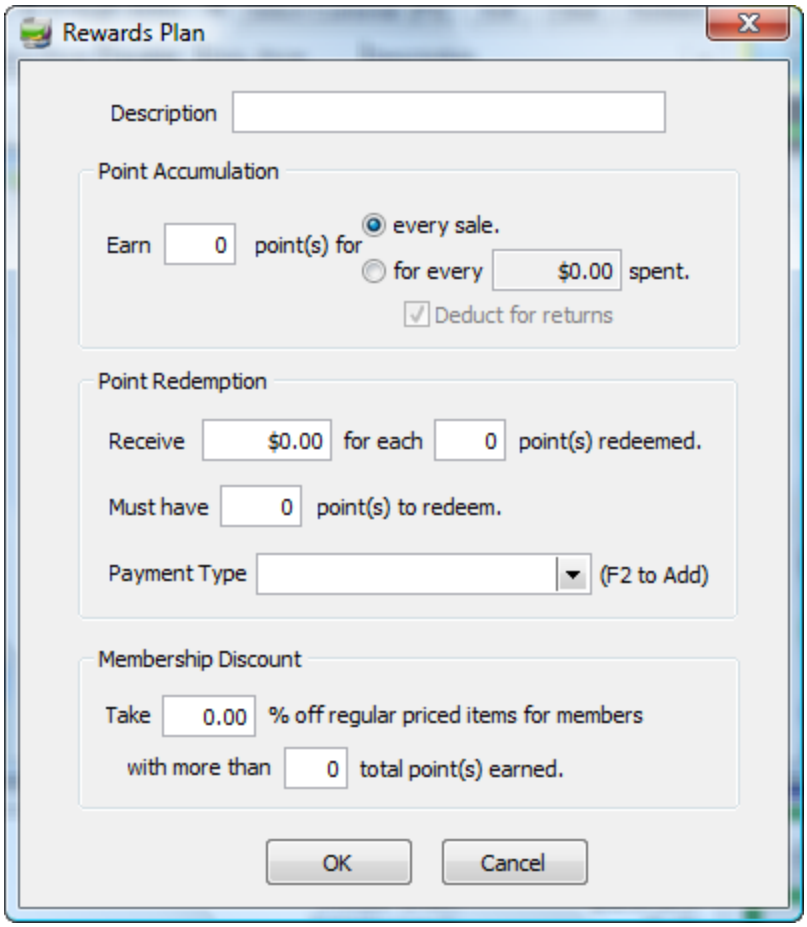
The following steps can be used to setup a Rewards Plan in Liberty.

> ***Note:*** *Be sure to use Gift Certificates as the payment type when setting up your Rewards Plan.*

1. In the PoS Module, select **Setup > Maintain Reward Plans**. The Maintain Reward Plans dialog displays.



2. Click the **Add** button. The Rewards Plan dialog displays.



3. Enter a **Description** for the new rewards plan being created.

4. The Points Accumulation section allows you to indicate how the user earns points under this reward plan. You have the option to set the number of points earned for each sale or based on spending a specified dollar amount. For example, users can earn 5 points for every sale or 1 point for every $1 spent.

5. Use the **Deduct for returns** check box to indicate that the user will lose points for items they return. This field is only active for reward plans based on earning points for spending a specific dollar amount, such as the 1 point for every $1 spent example.

6. There are two options you can choose from when creating a rewards plan:

   - **Point Redemption:** This method allows you to give points to your customers based on sales or amount of money spent in store. This allows the consignor to redeem the points in order receive store credit towards a purchase. Notice that you have the ability to set a minimum number of points needed to redeem. Please be sure to select a payment type to be used from the drop-down.

   - **Membership Discount:** This method would allow you to deduct a specific

Copyright 2010, Resaleworld.com, Inc.

percentage from regular priced items when the customer makes a purchase. However, you will need to specify a minimum number of points the customer is required to earn before they will receive the discount.

7. Click **OK**.

Related Topics

Assign a Reward Plan to an Existing Customer

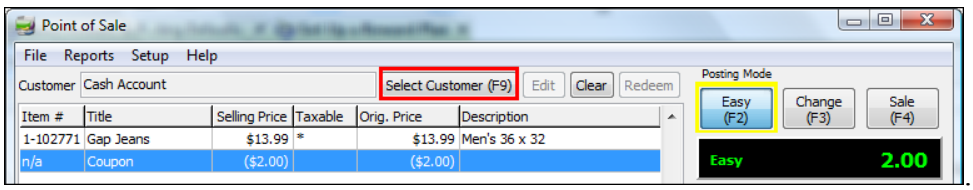
Assign a Reward Plan to a New Customer

Check a User Reward Plan Points

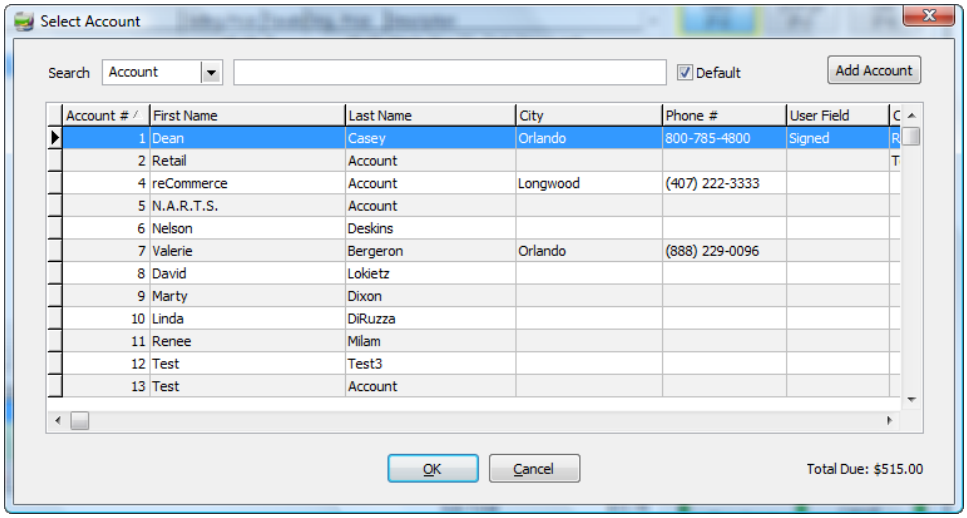
Assign a Reward Plan to an Existing Customer

PoS ➔ *Select Customer* ➔ *Customer Maintenance*

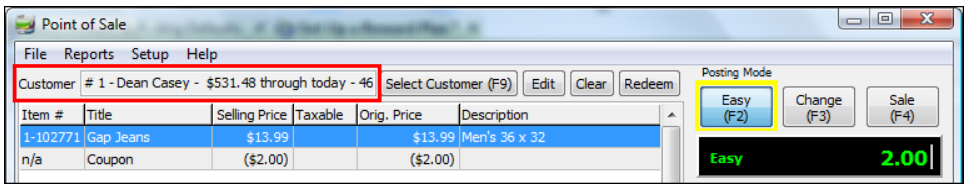
1. Once the reward plan has been created, you can assign it to users when they check out.
2. Ring up the order as usual in PoS.
3. At the top of the Point of Sale screen, click the **Select Customer** button.



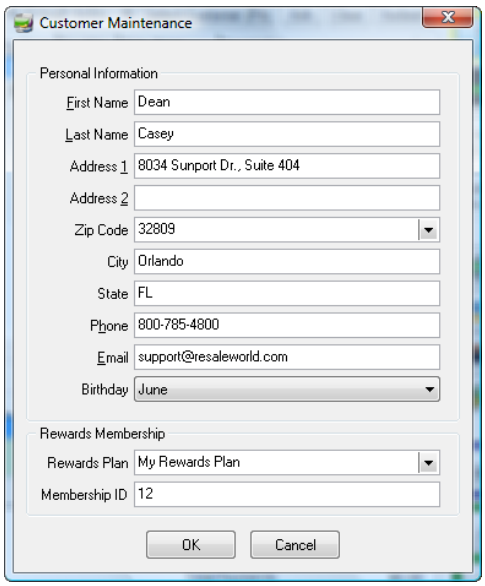
4. On the **Select Account** screen, select the customer's account and click **OK**.



5. The Select Account screen closes and the selected customer now displays at the top of the Point of Sale screen.



6. Click the **Edit** button to access the **Customer Maintenance** screen.



7. Use the **Rewards Plan** drop-down to assign this user to an existing plan.
8. Click **OK**. All of this user's purchases will now be applied towards the selected Reward Plan.

Related Topics

Set Up a Reward Plan

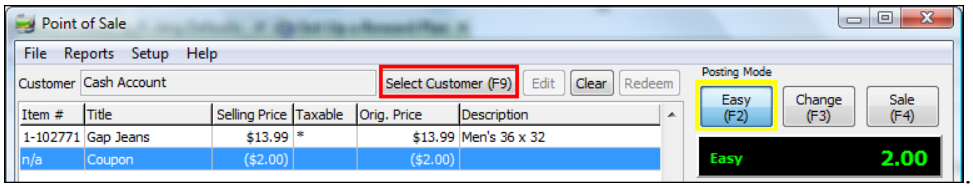
Assign a Reward Plan to a New Customer

Check a User Reward Plan Points

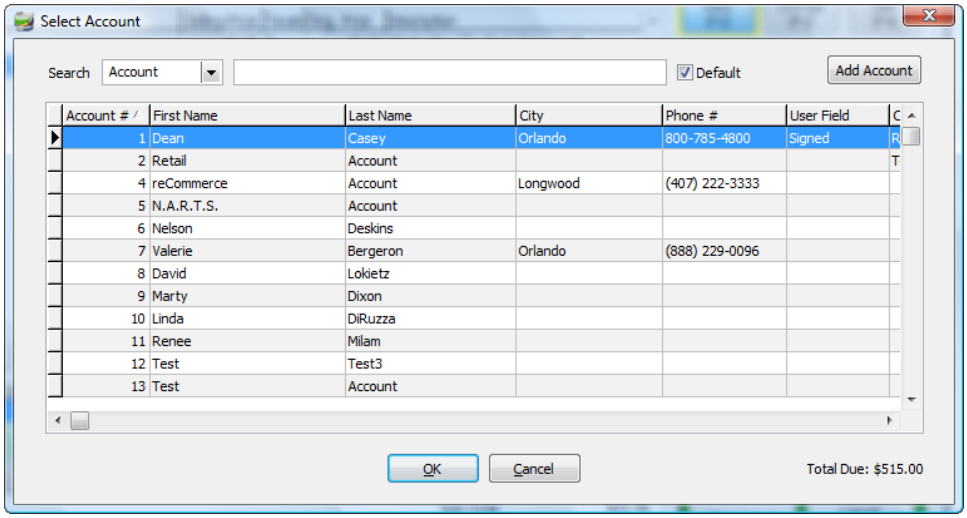
Assign a Reward Plan to an New Customer

PoS ➔ Select Customer ➔ Add Account ➔ Customer Maintenance

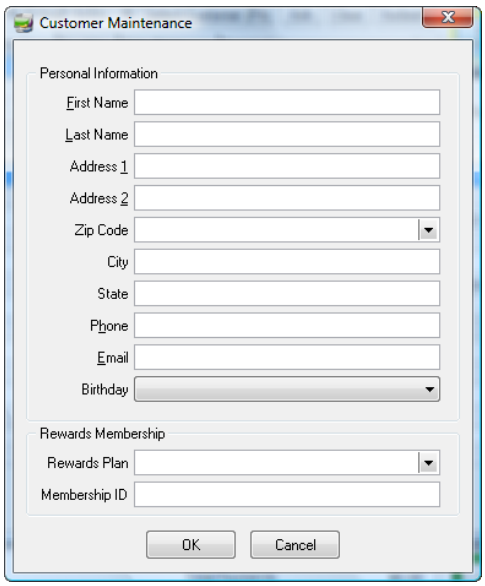
1. Once the reward plan has been created, you can assign it to users when they check out.
2. Ring up the order as usual in PoS.
3. At the top of the Point of Sale screen, click the **Select Customer** button.



4. On the **Select Account** screen, click the **Add Account** button.



5. On the **Customer Maintenance** screen, enter the Personal Information for the new customer.



6. In the **Rewards Membership** section, use the **Rewards Plan** drop-down to assign this user to an existing reward plan.
7. Enter the user's Membership ID.
8. Click **OK**. All of this user's purchases will now be applied towards the selected Reward Plan.

Related Topics

Set Up a Reward Plan

Assign a Reward Plan to an Existing Customer

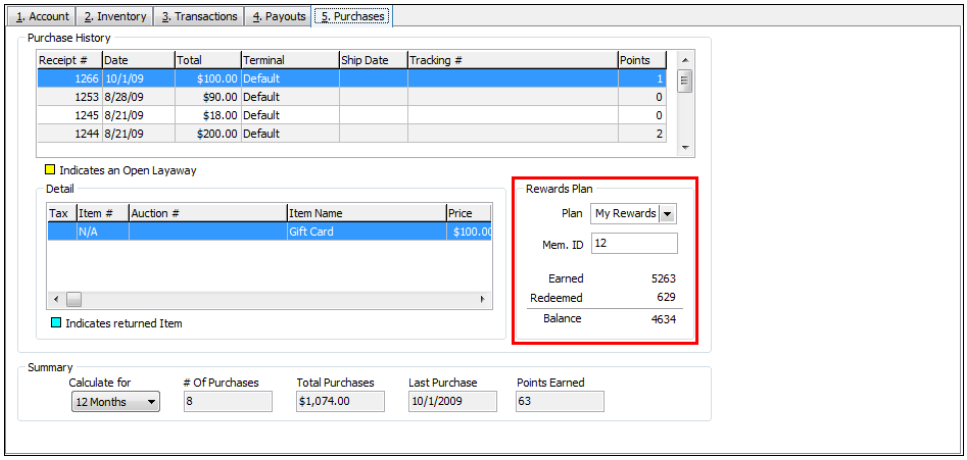
Check a User Reward Plan Points

Copyright 2010, Resaleworld.com, Inc.

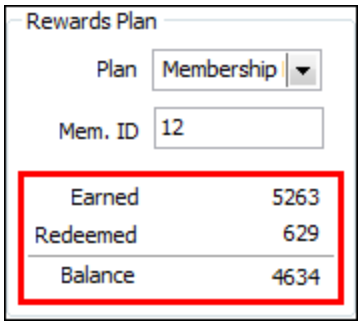
CHECK A USERS REWARD PLAN POINTS

Accounts ➔ *Account Detail* ➔ *Purchases*

1. Once the user has been assigned to a Reward Plan, you can check their points total on the Account Detail screen.
2. Click the **5 - Purchases** tab.



3. In the **Rewards Plan** section, use the drop-down to select the plan you want to view for this user.
4. As the user accumulates and redeems points, they will be tracked and displayed in this section below the drop-down.



Related Topics

Set Up a Reward Plan

Assign a Reward Plan to an Existing Customer

Assign a Reward Plan to a New Customer

Copyright 2010, Resaleworld.com, Inc.

Paying Clients

Copyright 2010, Resaleworld.com, Inc.

PAYOUTS OVERVIEW

Use Liberty to calculate and perform all payouts for:

- Clients and Store Accounts with items on **Consignment** (clients are paid for consigned items only **after** an item sells). These items have
- Clients and Store Accounts from whom items are **Purchased** (these clients may be paid for items immediately upon their being added to inventory).

Liberty is not used to pay **Retail Vendors**. Use a separate accounting package such as Quick-Books® to pay retail vendors.

Important Note #1: Failure to use the payout routines in Liberty may lead to incorrect payouts. Do not use other types of Transactions to perform payouts – use only the Payout routines described below.

Important Note #2: NEVER USE ACCOUNTING SOFTWARE TO PAY CLIENTS. Only use Liberty to pay clients. You may link Liberty with, or export information to, your accounting software (e.g. Quicken® or QuickBooks®). Use the accounting software for all other, NON-client specific accounting activities such as paying the rent, payroll, figuring taxes, etc.

There are two procedures for paying clients:

- **One Account at a Time**. This procedure is useful if you pay account holders on demand. Stores that pay clients at anytime would be an example. Another example is stores that pay clients with cash.
- **Multiple Accounts at a Time**. This procedure allows you to specify precisely which account holders are paid. Use this procedure when clients are paid on a regular or semi-regular basis. Paying all consignors on the 10th of the month for all sales made the previous month would be an example.

There are two methods of payment – cash and check. Payments made in cash require the printing of a Cash Statement. It is strongly recommended that Cash Statements always be printed so the store has written proof a cash payout was made. Statements provide a signature line for the client to sign, and should be kept on file by the store-not given to the client – for the store to have a written record of the payout.

Checks may be printed using one of three check formats:

Copyright 2010, Resaleworld.com, Inc.

1. **Laser/Ink Jet** checks have a check in the middle of an 8½ x 11 page, with a stub above and a stub below.
2. **Quicken** checks have a check at the top of an 8½ x 11 page, and two stubs below.
3. **Dot matrix** checks only work in dot matrix printers.

Please Contact Resaleworld to order checks for use with Liberty. Checks ordered from Resaleworld are guaranteed to work with Liberty. Checks ordered from other sources may not work. For more information, please see the section entitled Ordering Computer Checks from Resaleworld.

Liberty is designed to handle multiple bank accounts. If you wish to use more than one bank account to pay clients, see the section entitled Set Up Payment Accounts for more information.

Finally, a number of Payout Defaults are available to customize and simplify making payouts. See the section entitled Set Payment Defaults for more information.

Related Topics

Add a Note to a Transaction

Assess a Fee or Credit to an Item

VIEW TRANSACTION HISTORY

Inventory Module ➔ *3. Transactions Tab*

All transactions, including item sales and returns, deductions such as check fees, credits, etc. are recorded in each account's **Transaction History**.

> ***Note:*** *There is a Refresh button near the top of the screen. It is sometimes necessary to select Refresh to update the Transaction History window to show recent Transactions.*

At the bottom of the **3. Transactions** window note the following information is provided:

1. **Total Owed**: Shows the gross amount payable to the Account Holder.
2. **Total Payable as of {date}:** Shows the net amount due the Account Holder after

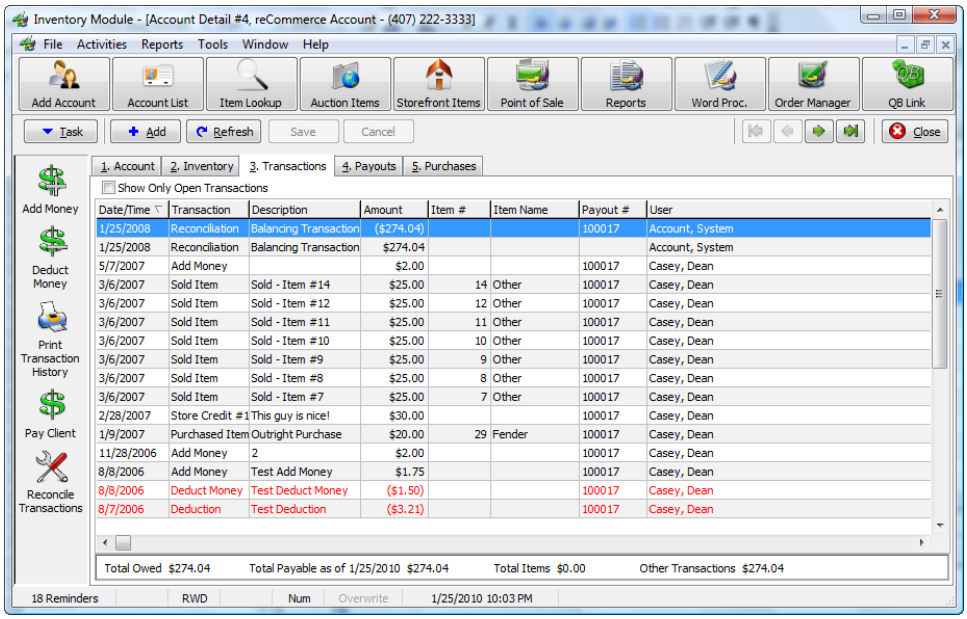
deductions, credits, and any Pay Delays are taken into account.

3. **Total Items:** The value of all items sold in the account.

Please see Determine Amount Payable to an Account Holder for more information.

To View Transaction History for an Account

1. Lookup an account.
2. Click on the **3. Transactions** tab. The Transaction History for the account will display:


Inventory Module - [Account Detail #4, reCommerce Account - (407) 222-3333]
File Activities Reports Tools Window Help
Add Account
Account List
Item Lookup
Auction Items
Storefront Items
Point of Sale
Reports
Word Proc.
Order Manager
QB Link
Task
Add
Refresh
Save
Cancel
Close
1. Account
2. Inventory
3. Transactions
4. Payouts
5. Purchases
Show Only Open Transactions
Add Money
Deduct Money
Print Transaction History
Pay Client
Reconcile Transactions
Date/Time | Transaction | Description | Amount | Item # | Item Name | Payout # | User
1/25/2008 | Reconciliation | Balancing Transaction | ($274.04) | | | 100017 | Account, System
1/25/2008 | Reconciliation | Balancing Transaction | $274.04 | | | | Account, System
5/7/2007 | Add Money | | $2.00 | | | 100017 | Casey, Dean
3/6/2007 | Sold Item | Sold - Item #14 | $25.00 | 14 | Other | 100017 | Casey, Dean
3/6/2007 | Sold Item | Sold - Item #12 | $25.00 | 12 | Other | 100017 | Casey, Dean
3/6/2007 | Sold Item | Sold - Item #11 | $25.00 | 11 | Other | 100017 | Casey, Dean
3/6/2007 | Sold Item | Sold - Item #10 | $25.00 | 10 | Other | 100017 | Casey, Dean
3/6/2007 | Sold Item | Sold - Item #9 | $25.00 | 9 | Other | 100017 | Casey, Dean
3/6/2007 | Sold Item | Sold - Item #8 | $25.00 | 8 | Other | 100017 | Casey, Dean
3/6/2007 | Sold Item | Sold - Item #7 | $25.00 | 7 | Other | 100017 | Casey, Dean
2/28/2007 | Store Credit #1 | This guy is nice! | $30.00 | | | 100017 | Casey, Dean
1/9/2007 | Purchased Item | Outright Purchase | $20.00 | 29 | Fender | 100017 | Casey, Dean
11/28/2006 | Add Money | 2 | $2.00 | | | 100017 | Casey, Dean
8/8/2006 | Add Money | Test Add Money | $1.75 | | | 100017 | Casey, Dean
8/8/2006 | Deduct Money | Test Deduct Money | ($1.50) | | | 100017 | Casey, Dean
8/7/2006 | Deduction | Test Deduction | ($3.21) | | | 100017 | Casey, Dean
Total Owed $274.04
Total Payable as of 1/25/2010 $274.04
Total Items $0.00
Other Transactions $274.04
18 Reminders
RWD
Num
Overwrite
1/25/2010 10:03 PM

3. Click the **Close** button or select another tab when finished.

Transaction History Fields Top of Window

Date/Time	Date and time of transaction.
Transaction	Type of transaction (Sold, Return, Credit on Account, etc.).
Description	Transaction description.

> ***Note:*** *Whenever an item is returned, an asterisk will appear in front of the Description. If an item is returned multiple times, the number of asterisks will correspond to the number of times the item was returned.*

For example, if an item is returned twice, then two asterisks will appear at the beginning of the Description.

Amount	Transaction amount. Note that all information in negative transactions is displayed in red.
Item #	When the Transaction is related to a specific item the item's number is listed in this field.
Item Name	A phrase created by combining the Category 3, Brand, and Primary Attribute (see the section entitled Overview of Categories, Tax Codes, and Product Lines for more details).
Payout #	The payout number the transaction was applied to.
User	User logged in when transaction occurred.

Copyright 2010, Resaleworld.com, Inc.

Held	Items may be placed **On Hold** to prevent them from being included in the next payout to the consignor. As long as an item is On Hold the consignor will not be paid for the item. The word **Yes** will appear in this field when an item is on hold

To Hold a Transaction (Put an Item On Hold):

1. In the Transaction History, right click on the Item to be placed On Hold.
2. Select **Hold Transaction**.

To Release a Transaction (Remove an Item from being On Hold):

1. Transaction History, right click on the Item to be placed On Hold.
2. Select **Release Transaction.**

Note (Unlabeled field)	When a Transaction has a Note, a folder symbol 🗁 will appear in this field. See the Tip below for more information.

Transaction History Information Shown at Bottom of Window

Total Owed	Shows the gross amount payable to the Account Holder.
Total Payable as of {date}	Shows the net amount due the Account Holder after deductions, credits, and any Pay Delays are taken into account.

You can also view or print the transactions for an account using various reports.

Tip: *You can reorder and change the size of the fields listed in the Transaction History window.*

To change the field order*, click and dragging the field labels (the header at the top of each column) to the left and right.*

To change the size of a field*, hold the mouse directly over the vertical line separating each field label. The mouse pointer will change to two vertical lines. Click and drag the field to resize it.*

Copyright 2010, Resaleworld.com, Inc.

*Note that the changes you make here are **Sticky**- the software remembers what you did so you don't have to redo this process.*

***Tip**: Each Transaction may have its own **Note**. To add a Note to a Transaction, right click on the Transaction, then click **Add/View Note**. Enter the Transaction Note in the dialog provided.*

A folder icon 🗁 will appear next to the Held field for each Transaction with a Note.

Related Topics

Print Transaction History

Assessing Fees to Accounts

View Payout History

Determine Amount Payable to an Account Holder

Combine Open Transactions

COMBINE OPEN TRANSACTIONS

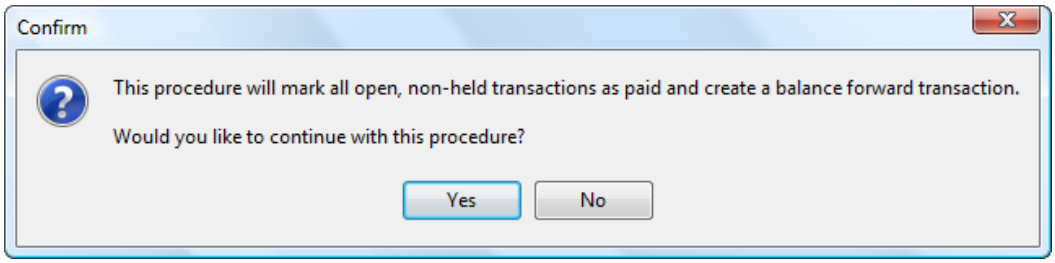
Inventory Module ➔ 3. Transactions Tab ➔ Reconcile Transactions Button

In some situations an account may have a very large number of open Transactions listed – sometimes too large and/or too complicated to view easily. Use the **Reconcile Transactions** routine to combine multiple open transactions into one transaction.

To Combine Transactions

1. Lookup the account in which open Transactions are to be combined.
2. Select the **3. Transactions** tab.
3. Select the **Reconcile Transactions** button (located on the left side of the screen). The

Confirm Reconcile Transactions dialog will display:


Confirm
This procedure will mark all open, non-held transactions as paid and create a balance forward transaction.
Would you like to continue with this procedure?
Yes
No

4. Click **Yes**.

> ***Note:*** *Items on hold are not included in the reconciliation.*

Related Topics

Hold a Transaction

Determine Amount Payable to an Account Holder

Inventory Module ➔ *3. Transactions Tab*

There are several methods for determining how much an Account Holder is owed. The easiest is to look at the bottom of the Transaction window.

To Determine the Amount Due an Account Holder

1. Lookup the account.
2. Select the **3. Transaction** tab.
3. At the bottom of the window are two figures:

a. **Total Owed**: Shows the gross amount payable.

b. **Total Payable as of {date}**: Shows the net amount due after deductions, credits, and any Pay Delays are taken into account.

To Determine Amount Due an Account Holder In Reports

1. In Reports, select **Payouts** → **Accounts Payable** Report. See Liberty Reports Overview for more information on generating reports.

Related Topics

View Transaction History

VIEW PAYOUT HISTORY

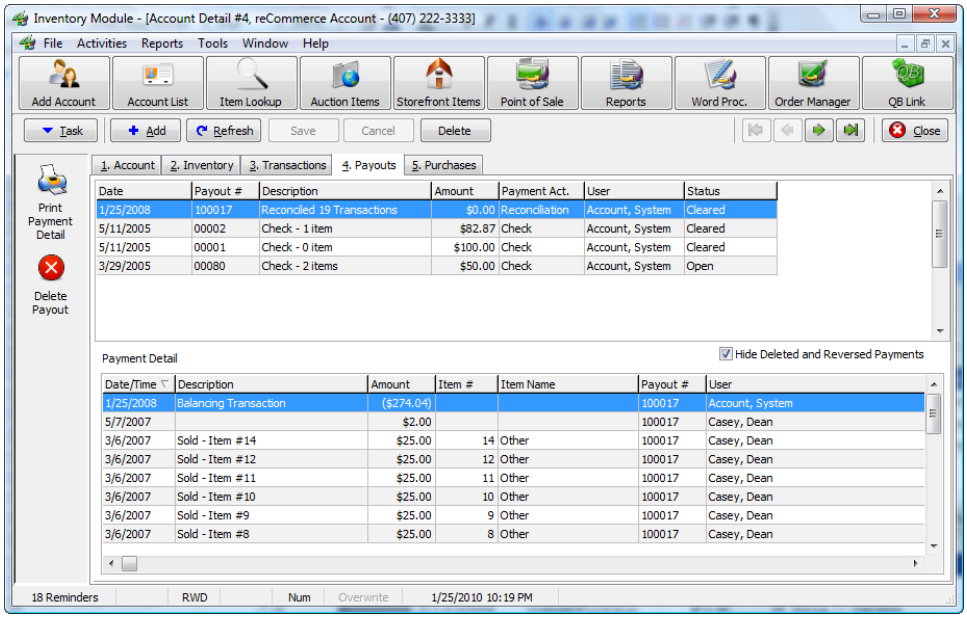
Inventory Module → 4. Payouts Tab

All transactions related to account payouts, include check, cash and reversed payouts, are recorded in each account's Payout History. View the Payout History to see a record of all account payouts. You can also generate various reports comprised of information contained in the Payout History.

> ***Note**: There is a Refresh button near the top of the screen. It is sometimes necessary to select Refresh to update the Payout History window to show recent Payouts.*

To View Payout History for an Account

1. Lookup an account.
2. Click on the **4. Payout** tab. The Payout History will display:



The top part of the window displays the Payouts. The bottom part of the window displays the details of the payout selected (highlighted) in the top part of the window. The fields contained in each window are described below.

> ***Tip**: Click on the **Hide Deleted and Reversed Payments** check box to reduce the amount of information that appears on screen.*

Payout History Fields (Top of Window)

Date	Date the payout was issued.
Payout #	Check or cash statement number.
Description	Type of payout (cash, check, manual check, reverse payment, etc.)
Amount	Payout amount. Note that all information in negative transactions is displayed in red.
Payment Act.	The account the payout was issued from.
User	Person who was logged on when this payout was issued.
Status	Current status of the payout. Following are definitions: • **Open**. Check is printed and posted, but has not yet cleared the bank. • **Posted**. Check is printed, posted, and has cleared the bank. • **Deleted**. Check has been deleted. • **Reversal**. Offset to a deleted. When a check is deleted, the status of the check becomes **Deleted**. **Example:** If a check for $10 is deleted, that check's status becomes ***deleted***, and an offsetting transaction for -$10 is created, with a status of ***Reversal***. • **Cleared**. No longer used.

Payout Details Dields (Bottom of Window)

Date	Date item sold.
Description	Transaction Description (sold, return, check fee, etc.)
Amount	Transaction amount. Negative amounts are in red.
Item #	When applicable, the number of the item in the transaction.
Item Name	A phrase created by combining the Category 3, Brand, and Primary Attribute (see the section entitled Overview of Categories, Tax Codes, and Product Lines for more details).
Payout #	Corresponds to the Payout # in the Payout # field at the top of the window.
User	User logged on when this transaction occurred.

Copyright 2010, Resaleworld.com, Inc.

***Tip**: You can reorder and change the size of the fields listed in the Payout History window.*

To change the field order, click and dragging the field labels (the header at the top of each column) to the left and right.

To change the size of a field, hold the mouse directly over the vertical line separating each field label. The mouse pointer will change to two vertical lines. Click and drag the field to resize it.

*Note that the changes you make here are **Sticky** - the software remembers what you did so you don't have to redo this process.*

Related Topics

Determine Amount Payable to an Account Holder

Print Payout History

View Transaction History

Clear Checks

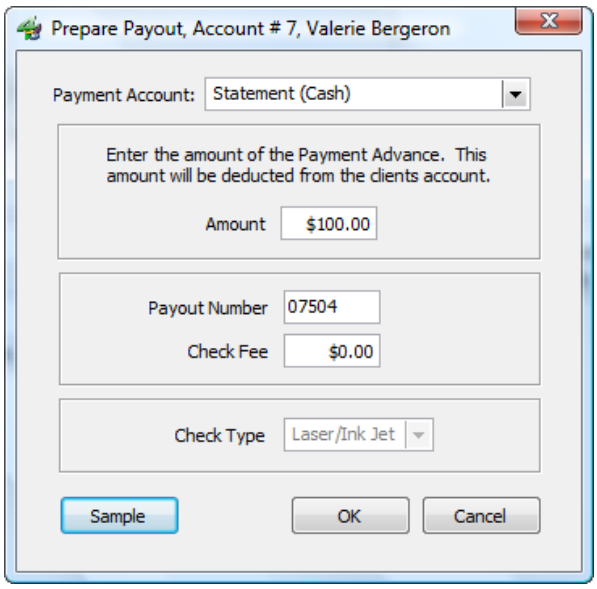
Reverse a Payout

PAYMENT ADVANCE OVERVIEW

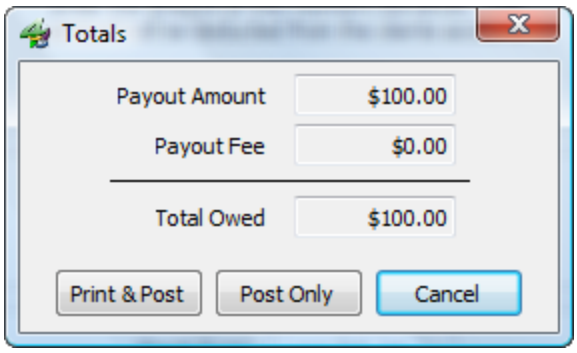
Liberty allows you to enter a payment advance if you want to provide a consignor with a portion of what they are owed, even if they are not yet owed a payment. For example, a payment advance could be entered for a consignor who needs cash before they are due a payment. So if a consignor is owed money at the end of the month, but needs funds before then, you would be able to give them an advance.

1. Open the Account for the consignor to which you are advancing payment.
2. From the **Task** menu, select **Pay Advance**. The **Prepare Payout** dialog displays.

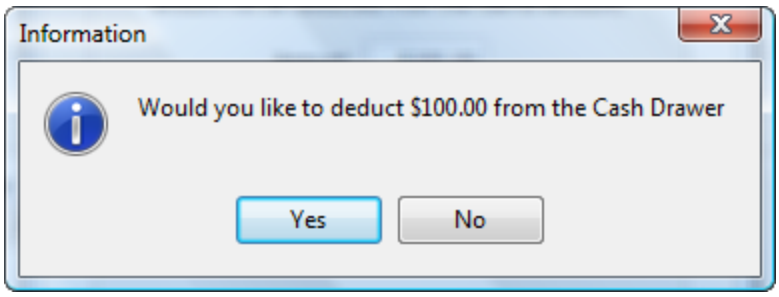
Copyright 2010, Resaleworld.com, Inc.



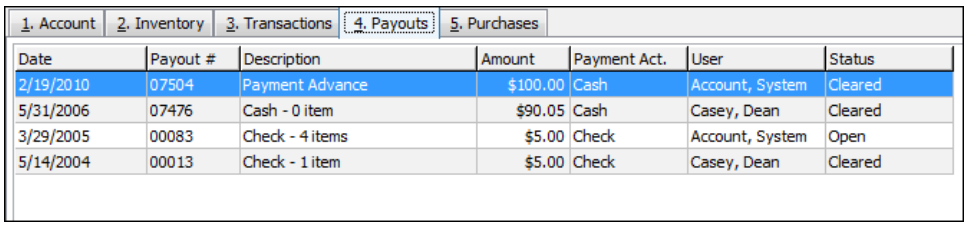
3. Use the **Payment Account** drop-down to select the account from which you withdrawing funds.
4. Enter the **Amount** of the advance.
5. The **Payout Number** is entered by default, but can be edited.
6. Enter the **Check Fee**, if necessary.
7. Click **OK**. The **Totals** screen displays and gives you the option to print and/or post the payment advance to the account.



8. Once you have confirmed the amount to post, Liberty will prompt you to confirm the payment.



9. Click **Yes** to post the payment.
10. The Payment Advance will now display on the **4. Payouts** tab of the consignor's account.



PAY ONE ACCOUNT

Inventory Module ➔ *Task* ➔ *Pay Client*

Use this procedure to pay just one account holder. Once the payout has been posted, inventory items are updated in the **Transaction History** and the payouts are recorded in the account's **Payout History**.

> ***Note:*** *Items designated as consigned are payable only after they are sold. Items designated as purchased outright are payable immediately.*

To Pay One Account Holder:

1. In Liberty Inventory, Lookup the account to be paid.
2. If the consignor is to be paid for all items, proceed to the step 4. If one or more items will be paid later, you may place a Hold on the items. Do this by:
    a. Click on the **3. Transactions** tab.
    b. Right-click on an item that will be paid later.
    c. Select **Hold Transaction**. The word **Yes** will appear in the **Held** column.
3. If the consignor has an item or items that are currently on Hold, and you wish to pay the

consignor for the item(s), do the following:

a. Click on the **3. Transactions** tab.

b. Right-click on an item that will be paid later.

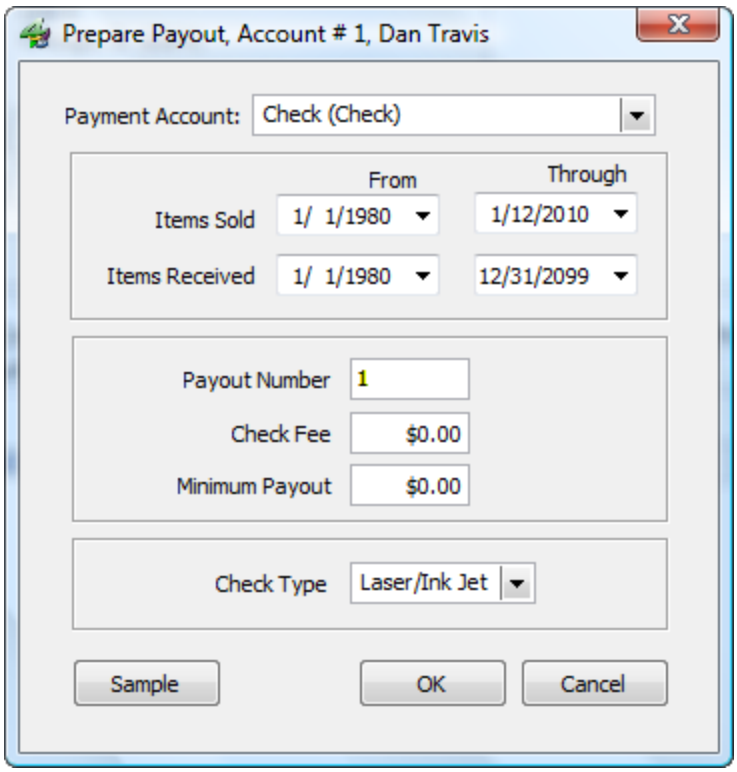
c. Select **Release Transaction**.

4. Next, either

   a. Select **Task** ➔ **Pay Client**, or

   b. Click on the **3. Transactions** tab, then select the **Pay Client** button on the left side of the screen.

   The **Prepare Payout** dialog will display:



5. First, ensure the correct account is selected in the **Payment Account** drop-down. If you are paying the client with a check, be certain **Check** or a checking account you have created is selected from the drop-down. If you are paying by Cash, be sure to select **Statement (Cash)**. For more information about Payment Accounts, see the section entitled Set Up Payment Accounts.

6. In the **Items Sold** fields (**From** and **Through**), enter the time period during which items must have sold in order for the client to be paid, then press <Enter>. To place a hold on a transaction or transactions so a consignor is not paid for a specific item at this time, see the section entitled Transaction History.

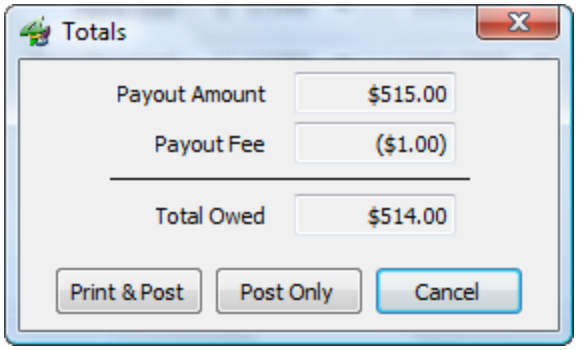
7. In the **Items Received** fields (**From** and **Through**), enter the time period during which

Copyright 2010, Resaleworld.com, Inc.

items must have been received into inventory in order for the client to be paid, then press <Enter>.

8. In the **Payout Number** field, enter the payout number (if paying by check, use the check number), then press <Enter>.
9. If there is a fee assessed for payouts, enter it in the **Check Fee** field, then press <Enter>.
10. If there is a minimum payout amount, enter it in the **Minimum** field, then press <Enter>. (If the client is owed less than the amount entered no payment will be made.)
11. If paying by Cash, skip this step. If paying by check, select the type of check. **Dot matrix** checks only work in dot matrix printers. **Quicken** checks have a check at the top of an 8½ x 11 page, and two stubs below. **Laser/Ink Jet** checks have a check in the middle of an 8½ x 11 page, with a stub above and a stub below.

    (Contact Resaleworld to order checks for use with Liberty. Checks ordered from Resaleworld are guaranteed to work with Liberty. Checks ordered from other sources may not work. For more information, please see the section entitled Ordering Computer Checks from Resaleworld>.)
12. If you wish to print a sample check or cash statement to make sure paper has been properly placed in the printer, click on the **Sample** button.
13. When the parameters are correct and you are ready to print the payout, click the **OK** button. The **Totals** dialog will display:



14. Select **Print & Post** if you are printing a Computer Check or Cash Payout Statement. Select **Post Only** if you are hand writing a check. Select **Cancel** to cancel the process.

If you make a mistake, follow the instructions provided in the section entitled Reverse a Posted Payment.

Related Topics

Payouts Overview

Hold a Transaction

Assessing Fees to Accounts and Items

Copyright 2010, Resaleworld.com, Inc.

Add a Note to a Transaction

Change Payment Account for Multiple Accounts Simultaneously

PAY MULTIPLE ACCOUNTS

Inventory Module → Activities → Accounting → Account Payments

The **Accounts Payments** routine lets you print payouts for virtually any group of accounts, and can be used to print either a batch of checks or cash statements. (Since batch statements are rarely done the routine is called **Check Preparation**.)

Once the payouts have been posted, inventory items are updated in the **Transaction History** and the payouts are recorded in the account's **Payout History**.

> ***Note:*** *Performing a batch payout is a multiple step operation. Depending on the number of payouts to be printed, this operation can take from 2 minutes to 2 hours or more.*

Warning: Once performed the Account Payments process cannot be reversed. We strongly recommend you perform a full backup immediately before every group payout, as the only viable way to fix the problem is to restore from backup and start over.

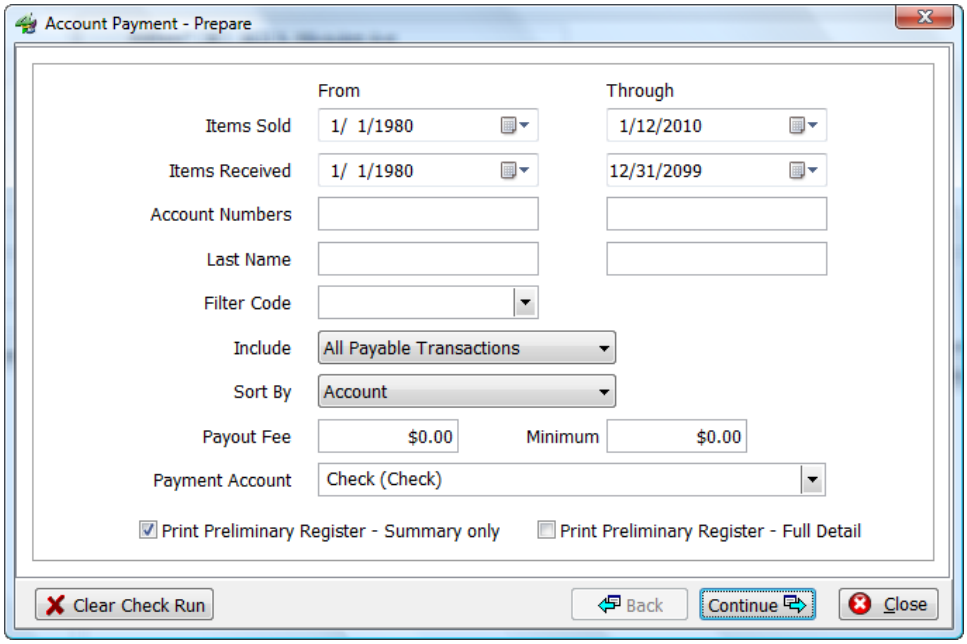
> ***Note****: Items designated as consigned are payable only after they are sold. Items designated as purchased outright are immediately payable.*

To Pay a Group of Accounts (19 Total Steps)

1. Run a backup. (This is because the Account Payments process cannot be reversed once it has been performed. Thus if a mistake is made the only way to fix it is to restore from backup.) If you are operating on a network and wish to be safe you should also run Account Payments when no one else is using Liberty.

2. From the main menu, click on **Activities → Accounting → Account Payments**. The **Prepare Account Payments** dialog will display:

Copyright 2010, Resaleworld.com, Inc.



3. Enter the necessary parameters for the Group Payout in the **Prepare Account Payments** dialog. Refer to the information below to learn more about the fields in this dialog:

Prepare Account Payments Dialog Fields

Items Sold

Use these fields to limit the payment to include only specific dates. To place a hold on a transaction or transactions so a consignor is not paid for a specific item at this time, see the section entitled Transaction History.

Items Received

Use these fields to limit the payment to include only items received during a specific time period.

CAUTION: If you only pay for items once during a specific time period, e.g. the previous months sales, and also specify a minimum check to print, be aware that by doing this it is possible that on occasion some Account Holders may not be paid for some items.

Take the following example as an illustration: Today is August 10th, and checks are being printed only for sales occurring between July 1 - July 31. A minimum check amount of $10.00 is specified. Any consignors with total sales which net them less than $10.00 will not receive a payment from this check run. If on September 10th checks are printed for sales occurring only from August 1 - August 31, the consignor will not receive any money for the sales made during July.

THIS IS NOT A SOFTWARE PROBLEM. This simply illustrates a potential problem which has been encountered in the past. It shows how important it is to consider all the ramifications of the steps taken when specifying check printing and report parameters.

Account Numbers

Enter the range of account numbers to pay. If you leave these fields blank, the system assumes you wish to pay all accounts.

Last Name

Enter the range of accounts' last names to pay. If you leave these fields blank, the system assumes you wish to pay all accounts.

Filter Code

Select a Filter Code if you wish to pay only those accounts containing the Filter Code selected.

Include

Choose whether to include **All Payable Transactions** (items sold, deductions, credits, etc.) or just **Items Only** in the payouts.

Sort By

Select the order in which payouts are to be printed: **Account Number** or **Last Name**.

Payout Fee

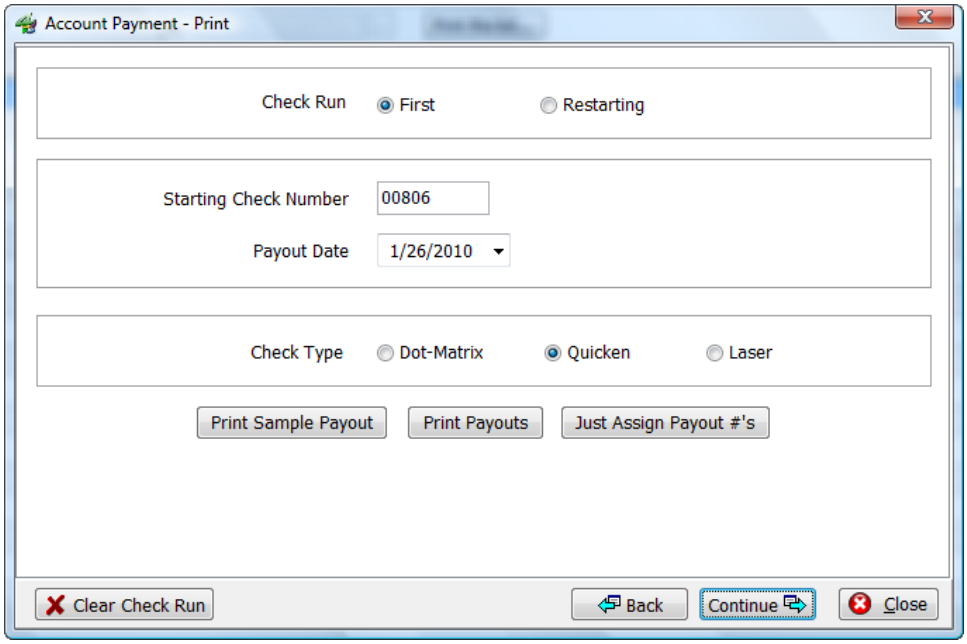
Enter the Payout (Check) Fee, if any. The amount of this fee will be deducted from the payment.

Copyright 2010, Resaleworld.com, Inc.

	See Set Up Payment Accounts to set or change the default Check Fee.
Minimum	Enter the minimum amount for which a payment may be made. If the account holder is owed less than the amount entered no payment will be made. See Set Up Payment Accounts to set or change the default Minimum.
Payment Account	Select the Bank Account to pay from, or select a cash account if paying the account holder in cash. *Important **Note:** when paying multiple accounts, only accounts that have been set for the payment account will be paid. In other words, an account with the default payment account set to Cash will not be paid when paying multiple accounts by Check.* See Set Up Payment Accounts for more information.
Print Preliminary Register	When the Continue button is selected a Preliminary (Payout) Register report is generated. Choose whether to print a register containing **Full Detail** or just a **Summary**.
Clear Check Run	Select this button if a Check Run was previously prepared but not posted, and the parameters of this Check Run are meant to replace those of the previously Check Run.
Continue Button	Select this button only after you are sure all of the following parameters are correct.
Close Button	Select this button to cancel the Group Payout.

4. When the parameters are correct, click on the **Continue** button. The number and total amount of the payouts will be calculated and displayed in the **Information** dialog.
5. Click **OK** to continue. The **Preliminary Register** will be generated.
6. Review the **Preliminary Register** carefully to ascertain the correct accounts are being paid. Print the register if you wish to compare it with the **Final Register** (described below). To print the Register, click on the Printer icon at the top of the screen, and select **OK** in the Print dialog.
7. Close the Register by clicking on the **Close** button at the extreme upper right of the screen (the **X**). The **Print Account Payments** dialog will display:

Copyright 2010, Resaleworld.com, Inc.



8. Enter the necessary parameters for the Group Payout in the **Print Account Payments** dialog. Refer to the information below to learn more about the fields in this dialog:

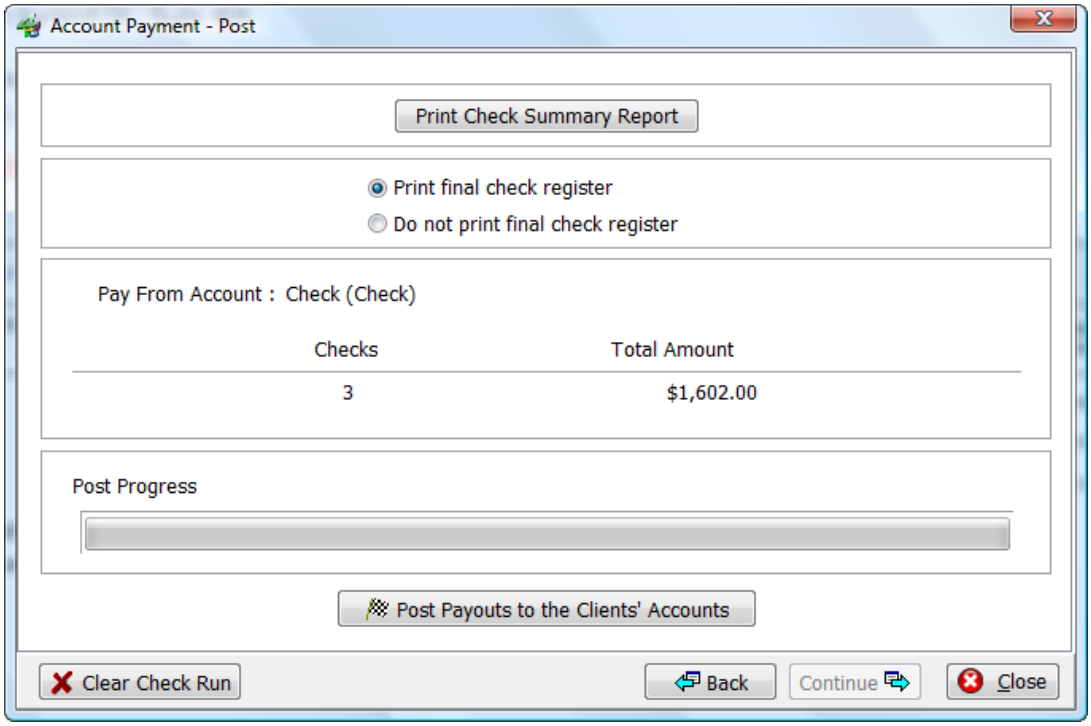
Print Account Payments Dialog Fields

Check Run	Select **Restarting** only if you are resuming an interrupted print payout process. **Example:** In the process of printing 100 checks, numbered 101-200, check 155 jams in the printer. After fixing the printer jam, select Restarting and enter the number of the last check that printed properly in the Last Good Check field that appears.
Starting Check Number	The number of the first check or cash statement to be printed. The system remembers check and statement numbers, so entering a new number is usually unnecessary.
Payout Date	Enter the date to be printed on the checks.
Check Type	If paying by check, select the type of check. Contact Resaleworld to order checks for use with Liberty. Checks ordered from Resaleworld are guaranteed to work with Liberty. Checks ordered from other sources may not work. See Ordering Computer Checks from Resaleworld for more information. **Dot matrix** checks only work in dot matrix printers. **Quicken** checks have a check at the top of an 8½ x 11 page, and two stubs below. **Laser** checks have a check in the middle of an 8½ x 11 page, with a stub above and a stub below. If you are hand writing a check or paying with cash, leave this option as is.
Print Sample Payout	Select this to print a **sample check**. This is useful to make sure checks are lined up and the printer is working properly. (No inventory information will be printed on this sample check.)
Print Payouts	Select to start printing payouts on the printer. Be sure all of the parameters in this dialog are correct before selecting this button.
Just Assign Payout #'s	Select this button when checks are to be posted but not printed. An example of when this would be used is when payouts are handwritten.
Clear Check Run	Select this button if a Check Run was previously prepared but not posted, and the parameters of this Check Run are meant to replace those of the previous Check Run.
Back	Returns you to the **Prepare Account Payments** dialog.

Copyright 2010, Resaleworld.com, Inc.

Continue	Select this button to go forward in the process to the next step, which is posting the payouts.
Close	Select to Cancel the group payout.

9. (Optional.) Select the **Sample** button to print a sample check.
10. Select the **Print** button to start printing checks or statements. Do not select the **Continue** button unless you are sure you want to skip the Print process.
11. The **Account Payment - Post** dialog will display. Wait for all checks to print before continuing.



12. Enter the necessary parameters in the **Account Payment - Post** dialog. Refer to the information below to learn more about the fields in this dialog:

Post Payout Dialog Fields

Print Check Summary Report	Select to print a report summarizing the checks (payouts).
Final Check Register (radio buttons)	Select whether to print a Final Check Register or not.
Post Payouts to the Clients' Accounts	Posts checks to accounts. This is a critical step - see below for details.
Clear Check Run	Select this button if a Check Run was previously prepared but not posted, and the parameters of this Check Run are meant to replace those of the previously Check Run.
Back	Returns you to the **Print Account Payments** dialog.
Close	Select to Cancel group payout.

13. Select whether or not to print a Final Check Register. Printing a Final Register is recommended. Comparing it to the Preliminary Register and the checks actually printed as a way to fully audit the group payout.
14. (Optional.) If there is a problem with the check run, such as a printer jam, you can use the Restart check printing routine to fix the problem. See the section entitled Restart check printing for details.
15. When **ALL** checks have printed properly and you are satisfied with the results, select the **Post Payouts to Client Accounts** button. This posts the items paid with this payout in each account as have been paid. Each item paid has its Payout field in the Transaction History and Display windows filled in with the appropriate payout number.
16. The Final Check Register will print.
17. A Warning dialog will ask **It is critical that checks finish printing prior to posting them. Have checks finished printing?** Answer yes **only** if checks have finished printing.
18. The **Confirm** dialog appears. Answer **Yes** to post the payouts.
19. Upon posting the payouts, the following occurs:
    a. Each account paid has its payout added to that account's Payout History.
    b. Each account's Transaction History is updated to show the payout number in the

Copyright 2010, Resaleworld.com, Inc.

Payout field for each posted transaction.

c. Each account's (Inventory) Display is updated to show the payout number in the Payout field for each item paid.

Related Topics

Ordering Computer Checks from Resaleworld

Cancel Check Printing

Restart Check Printing

View Transaction History

View Payout History

Clear Payouts

REVERSE A POSTED PAYMENT

Inventory Module ➔ *4. Payouts Tab*

Payouts may not be deleted, however, they can be reversed. When a payout is reversed, nothing happens to the original payout record, and a new record showing the reversal appears in the Payout History.

> ***Note:*** *While the term* ***Delete*** *is used liberally in this process, it is worth noting that even though it appears Liberty deletes payouts, in actuality it does not. This is done to maintain data integrity.*

To see reversed payouts, click on the Hide Deleted and Reversed Payments check box to remove the check. (The check box is located about half way down the right side of the screen.)

To Reverse a Posted Payment:

1. Lookup the account containing the payout to be reversed.
2. Select the **4. Payout** tab.

3. Highlight the payout to be reversed.
4. Click on the **Task** button, and then click on **Delete Payout**, or right click on the payout to be reversed and select **Delete This Payout**.
5. Click on the **OK** button and the **Yes** button.

   The payout remains in Payout History with a status of **Reversed**.

Related Topics

Payouts Overview

Pay One Account

Void an Unposted Payment

VOID AN UNPOSTED PAYMENT

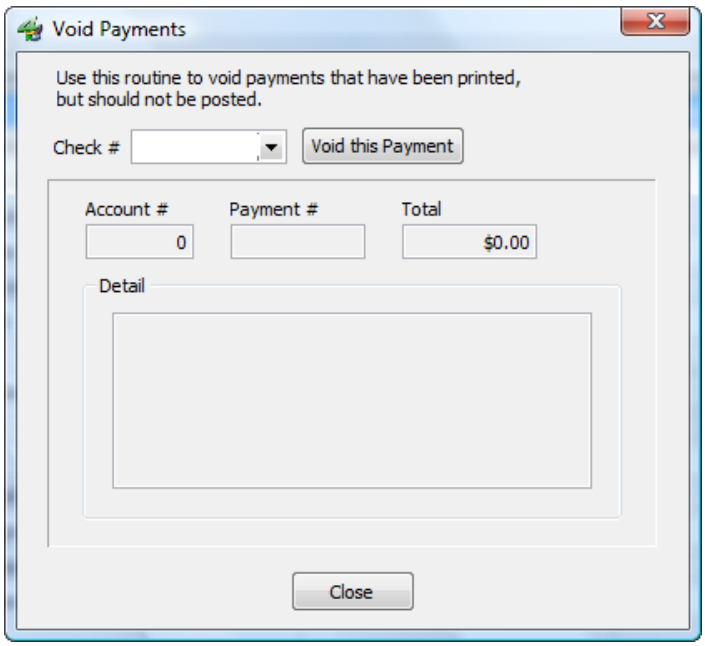
Inventory Module ➔ *Activities* ➔ *Accounting* ➔ *Void Payments*

Void Payments is used to cancel checks after they have been printed (using the Account Payments routine), but before they have has been posted. This is useful when a batch of checks has been printed, and some portion of the checks were printed in error. Rather than restore from backup and reprint the entire payout, using the Void Payments routine lets you select and remove just those checks that need to be removed.

> ***Note**: Void Checks can only be used to cancel checks **before** they have been posted. For checks that have already been posted, please see Reverse a Posted Payment.*

To Void a Check

1. Select **Activities** ➔ **Accounting** ➔ **Void Payments**. The Void Payments dialog displays.



2. Select the check to be voided from the **Check #** drop-down list.
3. Select the **Void this Payment** button.
4. Repeat steps 2 - 3 for all checks to be voided.
5. Click **Close** when finished.

Related Topics

Reverse a Posted Payment

Assessing Fees to Accounts and Items

Inventory Module ➔ *3. Transactions Tab*

Accounts may be assessed a fee for various reasons. Sometimes the fees are one-time charges, other times they are charged on a regular basis.

Examples of one time fees include:

Consignment Fee (a fee charged each time a consignment is brought in).

Seller's Fee (a fee charged each time a batch of items is brought in by a client for the store to purchase outright).

Pickup and Delivery Fee (Delivery Fees may also be charged in Point of Sale by using the F7 key. Use the routine described below to deduct the fee from an account: use the F7 key in PoS to charge the fee as part of a transaction.)

Examples of recurring fees include:

Annual Consignment Fee.

Monthly Rental Fee.

Fees may be assessed to a single account at a time. Fees may also be assessed simultaneously to a group of accounts.

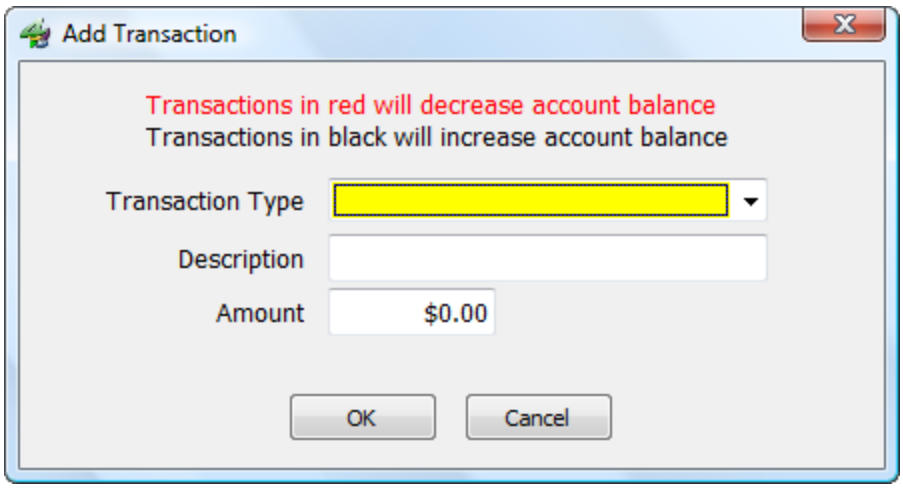
To Assess a Fee or a Credit to an Item

1. **Lookup** the Account.
2. Select the **2. Inventory** tab.
3. Right click on the item and select **Add/Deduct Fee to Item**. The Add Transaction dialog will appear.
4. Select the type of transaction (deduction or credit) from the **Transaction Type** drop-down in the **Add Transaction** dialog.
5. Enter a Description.
6. Enter the amount of the deduction or credit.
7. Click OK. The deduction or credit will appear in the Transaction display.

To Assess a One-Time Fee to a Single Account

1. **Lookup** the Account.
2. Select the **3. Transactions** tab.
3. Select the **Add** button. The **Add Transaction** dialog will display:

Copyright 2010, Resaleworld.com, Inc.



4. Select a transaction type from the **Transaction Type** drop-down list that will deduct money from the account.

> ***Note**: To add **Transaction Types**, go to **Tools** ➔ **Maintain** ➔ **Transaction Definitions**. See the section entitled Set Up Transaction Types for more information.*

5. Enter a description for the Fee in the **Description** field.
6. Enter the amount in the **Amount** field.
7. Select **OK**. The fee will appear in the Transaction screen, and be deducted from the next payout made to that account.

> ***Note**: To credit an account (to add money to an account), follow the same procedure as shown above, except select a Transaction Type that is a **Credit** instead of a **Deduction**.*

Related Topics

Set Up Transaction Definitions

Additional Info

Set Up Fee Frequencies

View Transaction History

Copyright 2010, Resaleworld.com, Inc.

Reversing a Fee from an Account

Like payouts, fees cannot be deleted. To remove a fee from an account, therefore, enter a **Reverse Entry** by either adding a Transaction that is a Credit, or by adding a Transaction that is a Deduction, but using a negative amount (a negative of a negative being a positive).

To Reverse a Fee in an Account:

1. Lookup the account.
2. Select the **3. Transactions** tab.
3. Select the **Add** button. The **Add Transaction** dialog will appear.
4. Select the same **Transaction Type** as contained in the transaction being reversed.
5. Enter a description for the Fee in the **Description** field. Be sure to say that it is Reversing another fee in the account.
6. Enter the amount in the **Amount** field **AS A NEGATIVE**. For instance, to reverse a $5.00 fee, enter ***-5.00***.
7. Select **OK**.

Assessing Fees to Multiple Accounts

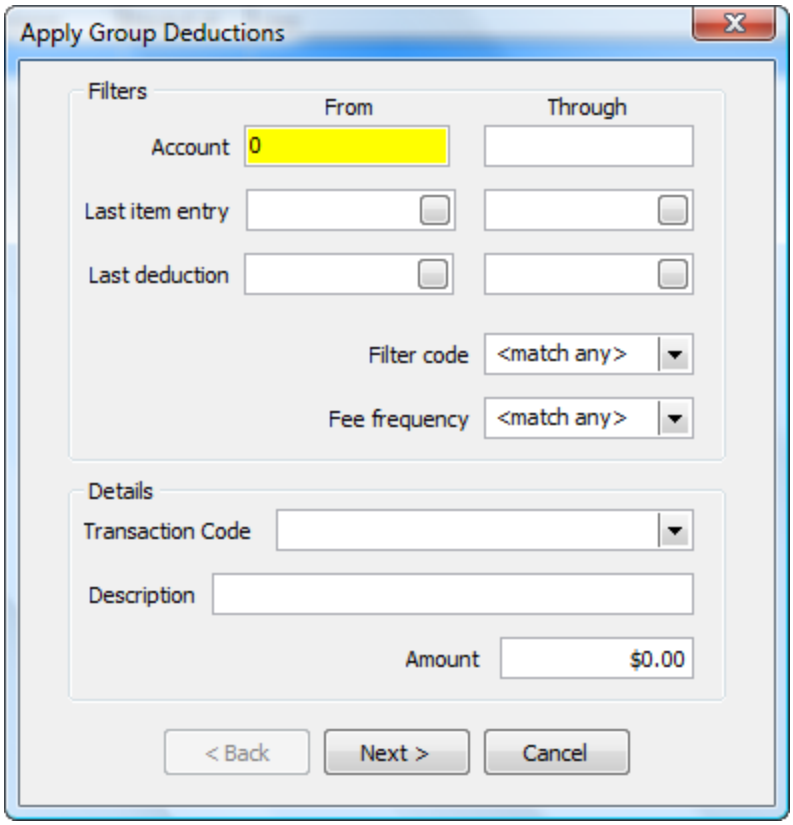
To run this routine you must first understand Fee Frequencies. Please see the section entitled Set Up Fee Frequencies for more information.

Copyright 2010, Resaleworld.com, Inc.

To Assess a Fee to Multiple Accounts Simultaneously

1. **Perform a**[backup]: if a mistake is made, it will be easier to restore from backup then to reverse the many incorrect fees.

2. From the Main menu of Liberty Inventory, select **Activities** → **Accounting** → **Apply Group Deductions**. The **Apply Group Deductions** dialog display:



3. Enter the range of accounts to assess a fee in the Account filter's **From** and **Through** fields.

4. **Optional:** Enter parameters in the **Last Item Entry**, **Last Deduction**, and/or **Filter Code** fields.

5. **Optional but recommended:** Choose a Fee Frequency from the **Fee Frequency** drop-down list.

6. Choose a Transaction Code from the **Transaction Code** drop-down list.

7. Enter a description for the fee in the **Description** field. This description will appear in the Description field in the **Transaction History**.

8. Enter the amount of the Fee in the **Amount** field.

9. Select the **Next** button. A **Preview Pane** will appear to the right of the dialog, with the

Copyright 2010, Resaleworld.com, Inc.

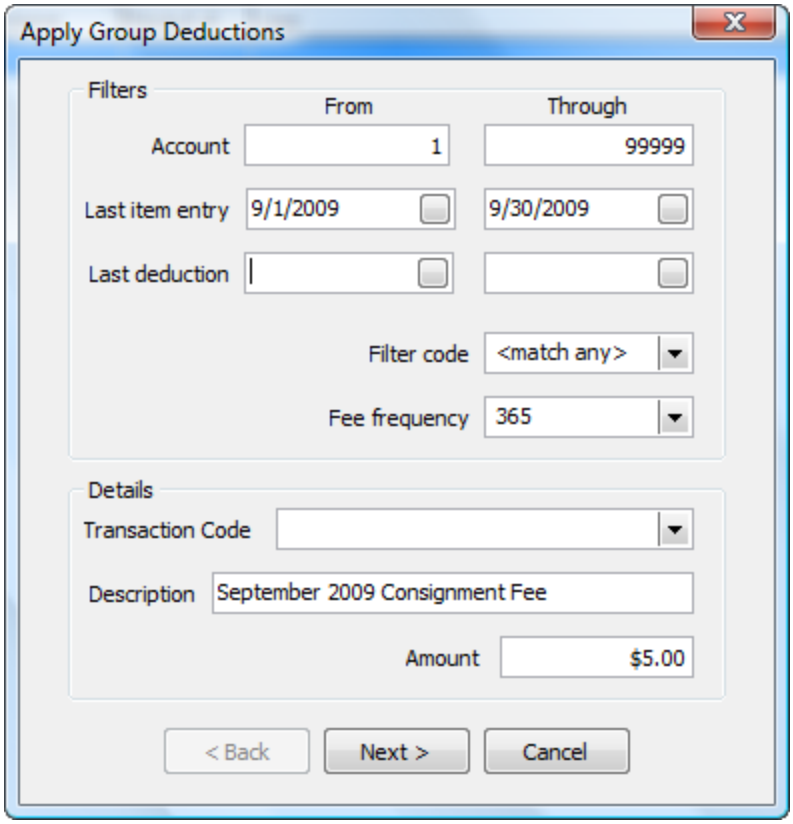
accounts to be assessed a fee listed.

10. Select **Finish** to assess the fee to the accounts selected. Fees will appear in each account's **Transaction History**.

How To Start Assessing An Annual Fee

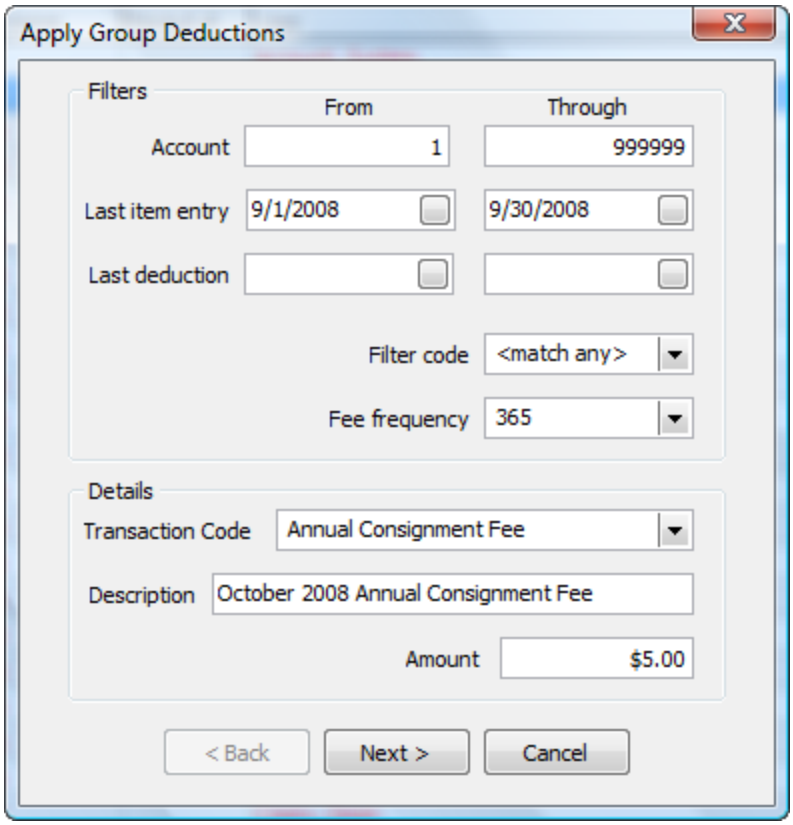
Situation: A store wishes to start charging a $5.00 annual consignment fee, starting September 1st. It further wishes to spread out the assessing of the fees over the year to smooth out cash flow. To accomplish this perform the following steps:

1. Create a **Transaction Code** entitled ***Annual Consignment Fee***. Set up the Transaction Code to be Negative so that the amount is deducted from accounts. (See the section entitled Set Up Transaction Types for more information on Transaction Codes.)
2. Create a **Fee Frequency** of ***365*** (365 days per year). (See the section entitled Set Up Fee Frequencies for more information on Fee Frequencies.)
3. Enter the 365 Fee Frequency in each client's Fee Frequency field when they bring in a consignment. (The Fee Frequency field is located on the Additional Info screen.)
4. Run the **Group Deductions** routine on October 1st by using the parameters shown in the following figure:



5. Continue performing steps 3 and 4 for all accounts. (It is not necessary to enter the 365 Fee Frequency again to an account that already has it.)

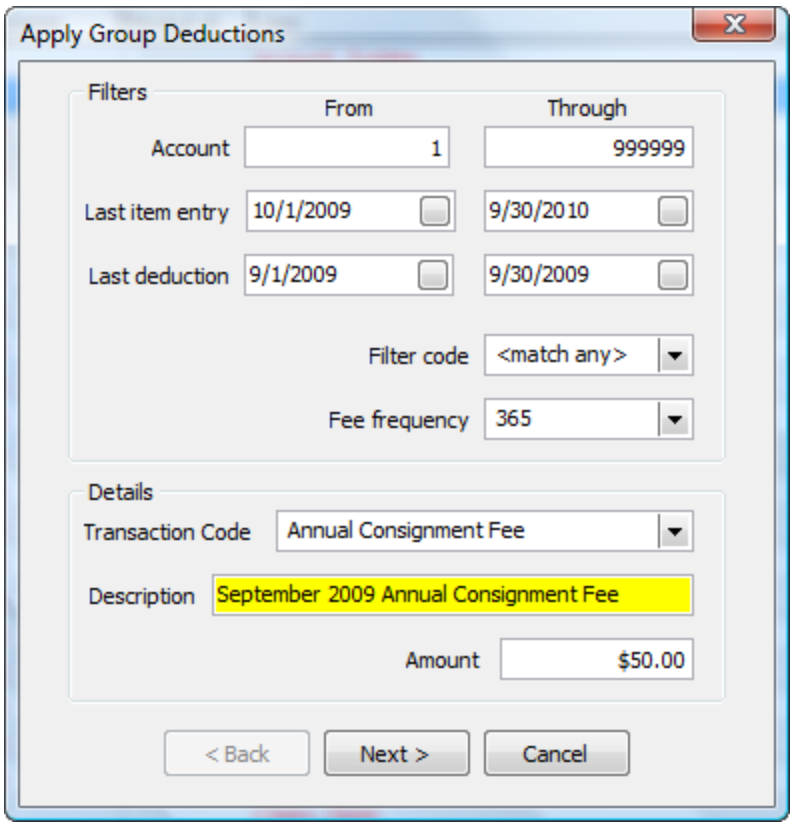
6. Run the Group Deductions routine on October 1st by using the parameters shown in the following figure. Note the subtle differences in the Last Item Entry and Description fields.



7. Repeat step 6 each month through September of the following year.

8. Starting October 1st of the following year, change the parameters entered in the Apply Group Deductions dialog as shown in the figure below.

Copyright 2010, Resaleworld.com, Inc.



Note that dates are now entered in the Last Deduction fields. By setting the parameters in this manner clients are only charged if another consignment is brought in.

Related Topics

Set Up Transaction Definitions

Additional Info

Set Up Fee Frequencies

View Transaction History

CLEAR CHECKS

Inventory Module → Activities → Accounting → Clear Checks

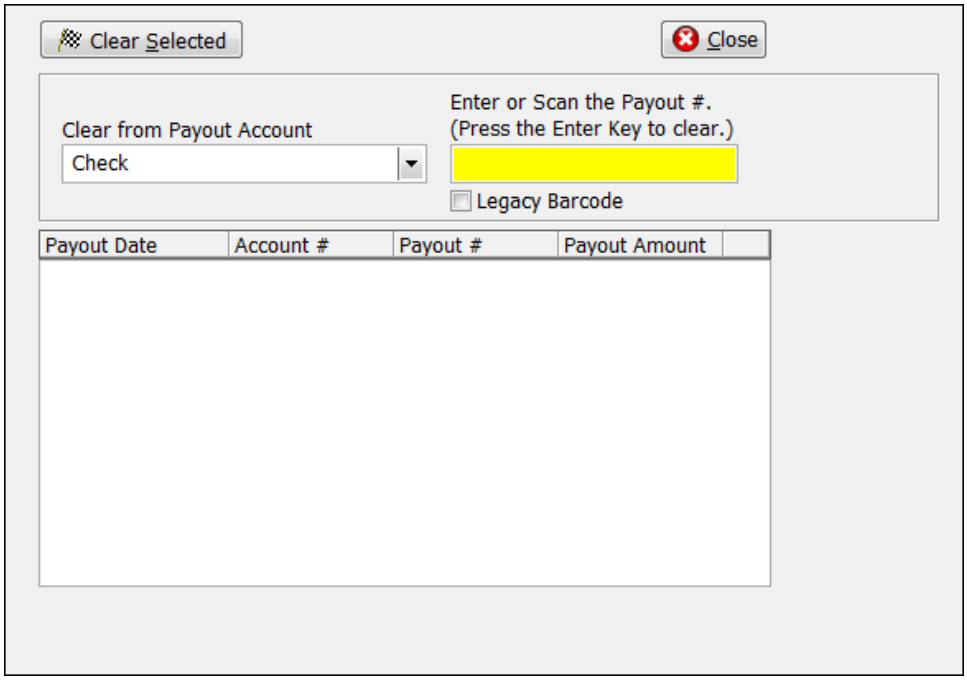
Clearing checks is the process of marking check to an account holder as having cleared the bank. It is not necessary to clear Cash payouts as they do not pass through the bank and thus do not appear on your bank statement.

The purpose of Clearing Checks is to be able to tell an Account Holder with a question about being paid whether their check(s) were cashed. This is a handy feature when a dispute arises about payment for items.

When a payout is cleared its status is changed from **Open** to **Cleared** in the **Status** field, which appears in the **Payout History** window.

To Clear Payouts

1. From the main menu, click on **Activities** ➔**Accounting**➔**Clear Checks**. The **Clear Checks** dialog will display:



2. Select the account from which to clear payouts in the **Clear from Payout Account** drop-down list.
3. Place the cursor in the **Enter or Scan the Payout #** field by clicking the mouse in the field.
4. **Scan** the bar codes on the checks, or alternatively

   Hold the <**Ctrl**> key down while clicking on the payouts to clear. This will allow multiple payouts to be selected simultaneously. When all payouts have been selected, click the **Clear Selected** button.

Copyright 2010, Resaleworld.com, Inc.

> ***Note:*** *When using a bar code reader be sure the* ***terminator*** *(the <enter> key) is turned off. (The terminator is sometimes referred to as the* ***termination character****.)*

5. When finished, click on the **Close** button and the checks scanned or selected will be changed from **Open** to **Cleared** in the client's account.

Related Topics

View Payout History

Printing Cash Payout Statements

Always print a Statement when paying with cash. Statements require a dated signature from the Account Holder. Keep all statements on file as proof Account Holders were actually paid. This is necessary for both Customer Service and Tax Audit reasons.

Cash Payout Statements are printed by choosing **Statement** instead of **Check** in the various payout routines.

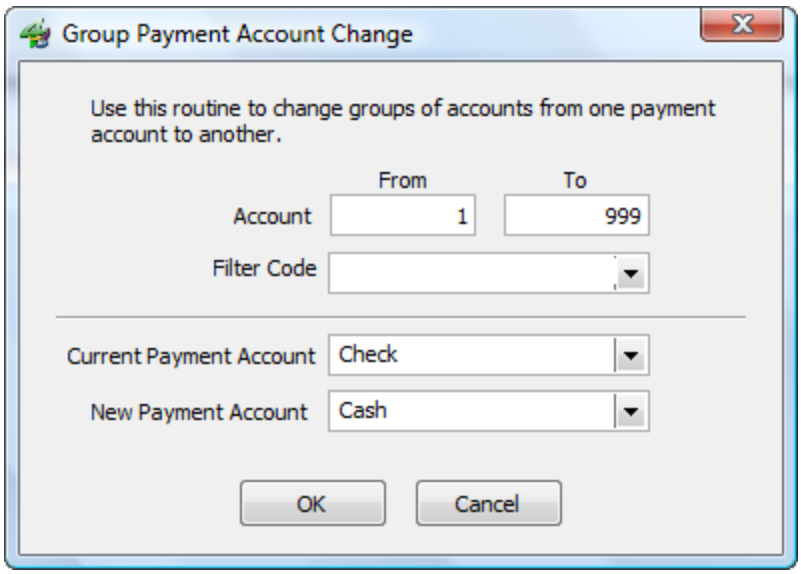
Change Payment Account for Multiple Accounts Simultaneously

Inventory Module → *Activities* → *Accounting* → *Change Payment Accounts*

Each account has a default **Payment Account**. If a change in banks is made, a new Payment Account is set up. This will necessitate changing the default Payment Account in many (or even all) accounts currently in the system. The **Change Payment Accounts** routine provides the ability to do this in one easy step.

To Change the Default Payment Account for Multiple Accounts Simultaneously

1. Select **Activities** → **Accounting** → **Change Payment Accounts**. The **Group Payment Account Change** dialog will display:



2. Enter the range of accounts to make the change to in the **Account From** and **Through** fields.
3. Enter the **Filter Code** for the accounts to be changed. Leave blank if Filter Codes are not used, or if all accounts in the Account Range, regardless of Filter Code, will be changed.
4. Select the appropriate **Payment Accounts** from the drop-downs provided for the **Current** (*top*) and **New** (*bottom*) **Payment Account** fields.
5. Select **OK**.

Related Topics

Set Up Payment Accounts

Printing

Copyright 2010, Resaleworld.com, Inc.

PRINT PRICE TAGS

Inventory Module → Item Entry Screen → Print Tags Button

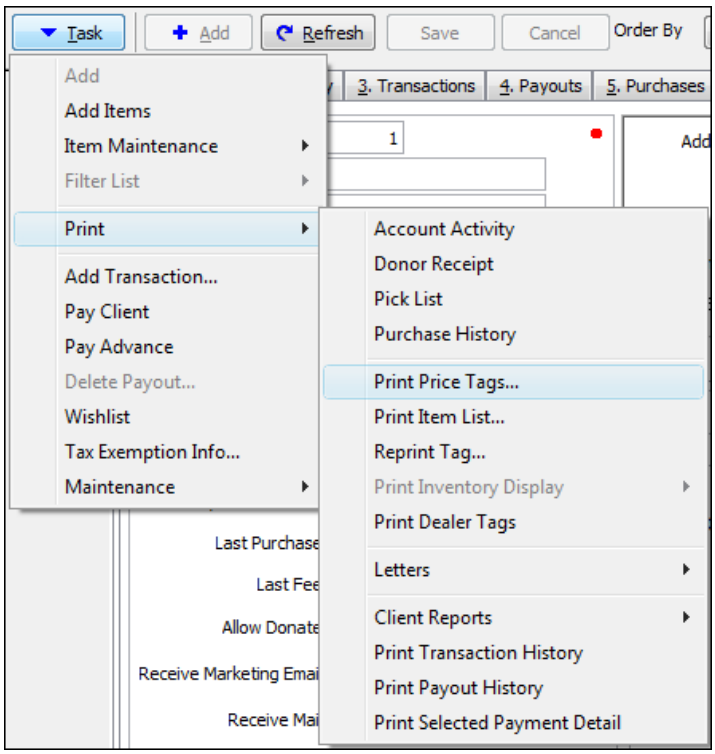
Liberty prints a wide variety of price tags and price labels. To order price tags and price labels please contact Resaleworld.

When printing tags and labels for one account, you may elect to print one price tag, all price tags for items entered today, price tags for a certain range of item numbers, etc. You may alternatively choose to print tags in a batch all at once using the Bulk Tag Printing routine.

Before you begin printing price tags, make sure the desired price tags are installed in the tag printer and the tag printer is turned on. If using colored tags print on the side of the price tag that is white or mostly white. Do not print on the side that has full color. Printing on the color side of the tag may be difficult to read and bar code readers may not be able to read the bar code.

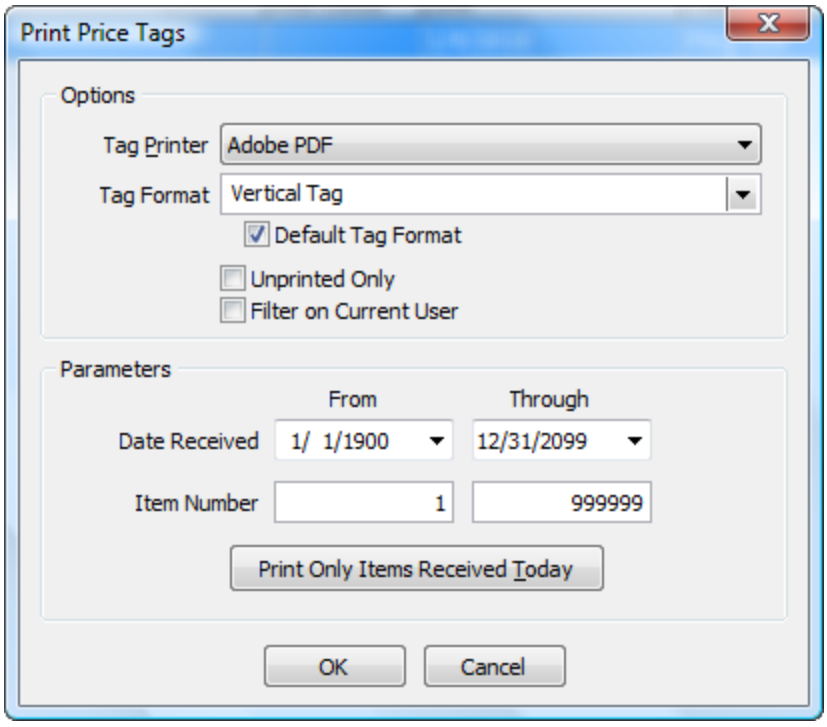
To Print Price Tags for an Account:

1. Lookup the account you wish to print tags for.
2. Select **Tasks → Print → Print Price Tags,** or



Select the **2. Inventory** tab, then click on the **Price Tags** button on the left side of the screen.

The **Print Price Tags** dialog will display.



3. Enter the necessary parameters in the **Print Price Tags** dialog. Refer to the information below to learn more about the fields in this dialog box:

Print Price Tags Dialog Fields

Field Name	Description
Tag Printer	Select the printer which will print the price tags. A default printer may be set under **Tools** → **Options** → **Printing**.
Tag Format	Choose the type of tag or label you are printing.
Default Tag Format	With your most frequently used price tag format appearing in the Tag Format field, check this box. This will default.
Unprinted Only	Click on the **Unprinted Only** check box to print tags only for items that have not had a tag printed before. (The way this works is that each item has a print tag flag. When an item is added, the flag is set to unprinted. When the item has its first price tag printed, the flag is changed to printed.)
Filter on Current User	Stores receiving a large number of items from one client and using multiple workstations to enter the client's inventory may find this option useful. The purpose of this option is to handle a situation where more than one workstation is used to enter items from a particular client. As a result more stores do not use this option. **Example:**A client brings in 100 items. 50 items go to workstation #1, where Ed enters the items under his **User ID** of ED. The other 50 items go to workstation #2, where Amy enters the items under her **User ID** of AMY . The items are entered on both workstations concurrently. As the items are added, it turns out that Ed on workstation #1 enters the first and second item, Amy on workstation #2 the third, fourth, and fifth, Ed on #1 the sixth, Amy on #2 the seventh, etc. When the items have all been entered, price tags must be printed. If all of the price tags are printed

Field Name	Description
	in one batch, then Ed and Amy have to figure out which tags to use at which workstation. This is time consuming and tedious, so Ed comes up with a better mousetrap. By clicking on the **Filter on Current User** check box, only the items entered by Ed will print on workstation #1's price tag printer. Amy also clicks on Filter on Current User and enjoys the same result where only the items she entered have tags printed on workstation #2's price tag printer. Note that for this to work, Ed and Amy have to be logged in under their own **User ID**. For more information on User ID's, passwords, and security in general, please see the section entitled Set Up Employee Access to Liberty.
Date Received	From and through dates (the date items were received) for printing price tags. Tags are not printed for items with a date falling outside the range entered. Enter the dates in MM/DD/YYYY form using the keyboard, or click on the drop-down and select the dates from the calendar.
Item Number	From and through item numbers for printing price tags. Tags are not printed for items with an item number falling outside the range entered. ***Note:*** *There is no character limit on the From and Through Item Number fields.*
Print Only Tags Received Today	Click this button to change the from and through Date Received parameters (above) to today's date. Think of this option as asking *Do you wish to print tags just for items received today?*

4. Select **OK** to print tags.

Helpful Tip*: At the conclusion of entering items, stay in the Item Entry screen (don't click the Close button). By selecting* ***Task*** ➔ ***Print Price Tags*** *while still in the Item*

Copyright 2010, Resaleworld.com, Inc.

Entry screen, Liberty will remember the item number you started with so you don't have to enter it.

Related Topics

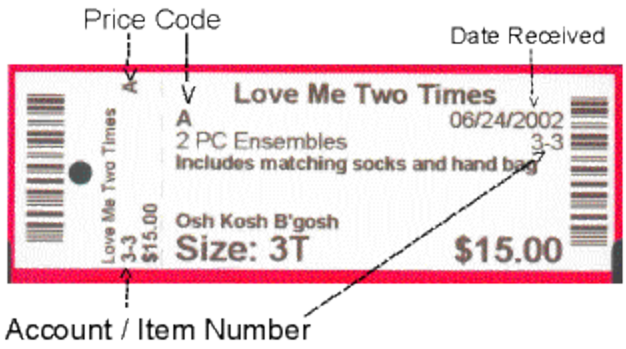
Ordering Price Tags from Resaleworld

Select Printers & Printing Defaults

Cancel Tag Printing

Price Tag and Label Types & Formats

A variety of price tag formats and styles are available for use with Liberty. The amount and lay-out of information varies between tag styles. The following guide will help illustrate what information is typically provided on the various tags.



Following are descriptions of the various types of price tags and price labels, as well as the formats in which they may be printed.

***Note**: Labels have adhesive backing, whereas tags do not.*

Price Tags are Available for the Following Types of Printers:

- **Thermal.** Due to their speed, quiet operation, and efficiency thermal printers are the preferred printer type for printing price tags. **Use only one of these two types of thermal printers:**
  - **Orion/2433.** Manufactured by Zebra.
  - **2622/2722.** Manufactured by Zebra.
- **Dot Matrix.** Be sure to follow Resaleworld's dot matrix printer recommendations: Do not purchase a dot matrix printer before making sure it will work! If in doubt, contact Resaleworld for advice.
- **Laser.** Any Windows compatible laser printer should work. May also be used in ink jet printers.
- **Ink Jet.** Any Windows compatible ink jet printer should work. May also be used in laser printers.

***Note**: Printing price tags designed for use with Laser and Ink Jet printers can only be accomplished using the Bulk Tag Printing routine.*

***Note**: It is not possible to print price tags on a printer for which they are not specifically designed. For instance, one cannot print tags designed for thermal printers using a laser printer.*

Price Tag and Price Label Types

***Note**: To reduce the number of price tag Types/Formats listed in the Tag Format field in the Print Price Tag dialog, see Select Printers & Printing Defaults.*

- **Thermal Two Across Tags and Labels**. Measure approximately 3 3/8 inch x 1 3/16 inch. Print out side by side, hence the nameTwo Across.

  Thermal Two Across Price Tags are available in 15 colors: Red, Orange, Yellow, Green, Dark Blue, Purple, White, Pink, Tan, Grey, Peach, Light Blue, Lavender, Teal, and Mint.

Copyright 2010, Resaleworld.com, Inc.

Thermal 2 Across Price Labels are available only in white.

Regular Price Tag

(available in thermal and dot matrix

Dual Price Tag

(Available in thermal and dot matrix)

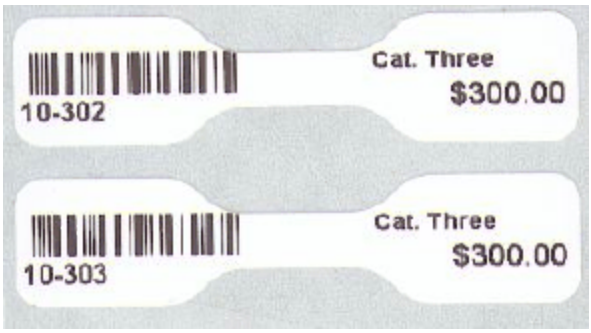
- **Dot Matrix**. Available in price tags only. One across. Measure 4 inch x 1.5 inch. Available in 12 colors: Red, Orange, Yellow, Green, Dark Blue, Purple, White, Pink, Tan, Grey, Peach, and Light Blue.
- **Mini**. Direct thermal labels for use with jewelry and other small items. Measure approximately 3/4 inch x 1 inch. Available in white adhesive labels only.

Mini Tag

(available in thermal only)

- **********
    - **Jewelry**. Direct thermal labels in the shape of a barbell for use with jewelry. Avail-

able in white adhesive labels only.



Jewelry Tag

(available in thermal only)

- **********

  - **Laser/Ink Jet**. Price tags are designed for use in any Windows compatible laser or ink jet printer.

Regular Laser Tag

(available in laser only)

Note: Because there are 15 tags per sheet, to reduce waste these tags may only be printed using the Bulk Tag Printing routine.

- **********

  - **Furniture Tag**. Larger, thermal price tags designed for use with furniture and other large items.

Furniture Tag

(available in thermal only)

- **********

  - **Thermal One Across Price Tags and Labels**. Sorry, this format is no longer available.

Price Tag And Price Label Formats

- **Drop Off-Style A (Narrow and Wide).** Standard tag layout, showing Store Name, Size, and Price in large print; description, attributes, brand, date received, price code, and other information in smaller print. Does not show markdown prices.
- **Regular**. Standard tag layout, showing Store Name, Size, and Price in large print; description, attributes, brand, date received, price code, and other information in smaller print.

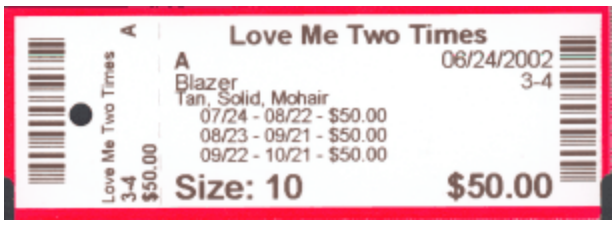
Copyright 2010, Resaleworld.com, Inc.

Does not show markdown prices.

Regular Format

- **********

  - **Dual**. Similar to Regular format, except length of information for each field is shorter to make room to show up to three markdown periods and prices.



Dual Format

- **********

  - **Markdown**. Shows only Store Name and up to five markdown periods and prices.
  - **Both**. Choosing **Both** instructs Liberty to print a Regular tag followed immediately by a Markdown tag for the same item.
  - **Mini**. Due to space limitations only the most important information is printed, including store name and price.

Related Topics

Printing the Size Attribute on Price Tags

Ordering Price Tags from Resaleworld

Print Price Tags and Price Labels

Select Printers & Printing Defaults

Cancel Tag Printing

Copyright 2010, Resaleworld.com, Inc.

BULK TAG PRINTING

Inventory Module → *Reports* → *Bulk Tag Printing*

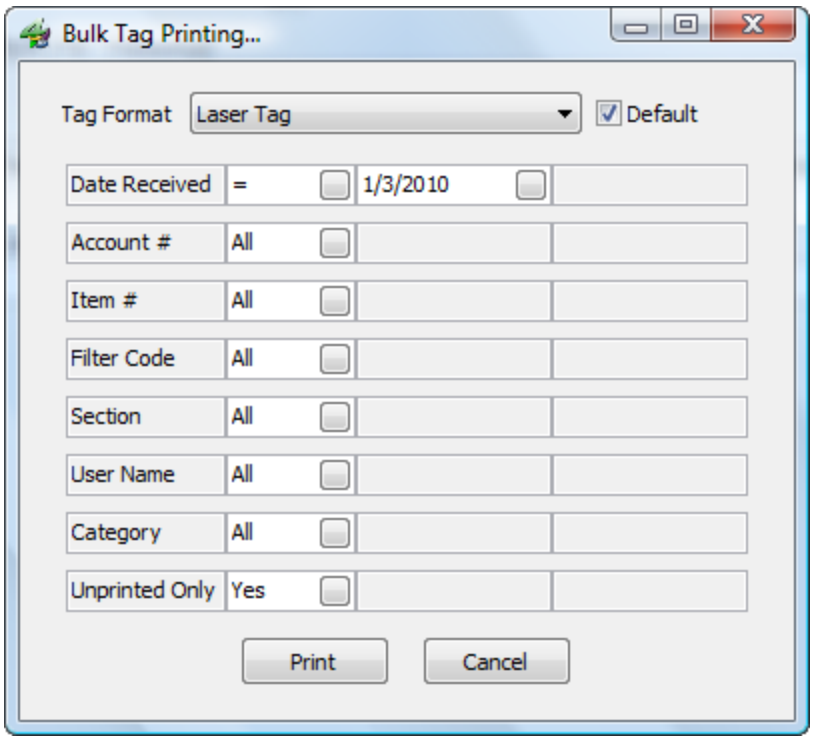
The Bulk Tag Printing routine is used to print a batch of tags for multiple accounts all at once. This allows you, for example, to enter inventory all day long, then print the tags all at once at the end of the day.

> ***Note**: Printing price tags designed for use with Laser and Ink Jet printers can only be accomplished using the Bulk Tag Printing routine.*

The Bulk Tag Printing routine operates in the same manner as reports: it is necessary to select parameters and operators. For more information, see Setting Report Parameters.

To Print a Batch of Price Tags or Labels

1. Select **Reports** → **Bulk Tag Printing.** The **Bulk Tag Printing** dialog will display:



2. Select the type of price tag or label to be printed from the drop-down list in the **Tag**

Copyright 2010, Resaleworld.com, Inc.

Format field.

3. Select the required parameters in the **Date Received**, **Account #**, **Item #**, **Filter Code**, **Category** and/or **Unprinted Only** fields. (**Unprinted Only** refers to items for which no price tag has yet been printed.)
4. Select the **Print** button.

Example: To print Regular Two Across Price Tags for all items received on January 27, 2002, enter information in the fields as shown in the following figure:

Related Topics

Print Price Tags and Price Labels

Select Printers & Printing Defaults

Setting Report Parameters

CANCEL TAG PRINTING

Start → *Settings* → *Printer*

To Cancel Tag Printing

1. On your Windows Start menu, select **Control Panel** → **Printers**.
2. Either double-click on the **Price Tag** printer or right-click on it and select "Open". The Price Tag printer dialog displays.
3. From the **Printer** menu, select **Cancel All Documents**. All current and pending print jobs will be cancelled.

Related Topics

Print Price Tags and Price Labels

Select Printers & Printing Defaults

Copyright 2010, Resaleworld.com, Inc.

PRINTING CHECKS

For information and to order computer checks, please contact Resaleworld.

When Printing Checks, Determine How The Printer Being Used To Print Checks Requires Paper Be Loaded:

- Printed side of checks facing up (dot matrix, some laser printers, some ink jet printers), or
- Printed side of checks facing down (some laser printers and some ink jet printers).

Note: *If the checks must be loaded facing down, be sure to order them from the check manufacturer in reverse order. This way you can load the checks into the printer with the lowest number on top and facing down. It is necessary to do this so that if a check jams you can restart the check run with the next check number.*

Related Topics

Pay One Account

Pay Multiple Accounts

Ordering Computer Checks from Resaleworld

Restart Check Printing

Cancel check printing

Void an Unposted Payment

Copyright 2010, Resaleworld.com, Inc.

RESTART CHECK PRINTING

Inventory Module → *Activities* → *Accounting* → *Account Payments*

Use this procedure if you Restart a group payout. Such a step is necessary if a check jams in the printer or there is a loss of power during the check run.

Example: In the process of printing 100 checks, numbered 101-200, check 155 jams in the printer. After fixing the printer jam, select Restarting and enter the number of the last check that printed properly in the Last Good Check field that displays.

To Restart Check Printing:

1. If you are not already in the Print Account Payments Dialog, select **Activities** → **Accounting** → **Account Payments**. The **Print** dialog displays.
2. Refer to the information below to learn more about the fields in this dialog.
3. Select the **Restarting** radio button.
4. Type in the new starting check number in the **Starting Check Number** field.
5. Type the last check number that printed correctly in the **Last Good Check** field.
6. Click the **Print** button.
7. When the checks have all printed, continue the Account Payment process. Refer to Pay Multiple Accounts for details.

Copyright 2010, Resaleworld.com, Inc.

Print Account Payments Dialog Fields

Back	Returns you to the **Prepare Account Payments** dialog.
Continue	Select this button to go forward in the process to the next step, which is posting the payouts. Normally you choose the **Print** button and not the Continue button. Choose Continue only when you wish to skip the print process, for instance, when hand writing checks.
Sample	Select this to print a **sample check**. This is useful to make sure checks are lined up and the printer is working properly.
Print	Select to start printing payouts on the printer. Be sure all of the parameters in this dialog are correct before selecting this button.
Cancel	Select to Cancel the group payout.
Check Run	Select **Restarting** only if you are resuming an interrupted print payout process. **Example:** In the process of printing 100 checks, numbered 101-200, check 155 jams in the printer. After fixing the printer jam, select Restarting and enter the number of the last check that printed properly in the Last Good Check field that displays.
Starting Check Number	The number of the first check or cash statement to be printed. The system remembers check and statement numbers, so entering a new number is usually unnecessary.
Check Type	If paying by check, select the type of check. Contact Resaleworld to order checks for use with Liberty. Checks ordered from Resaleworld are guaranteed to work with Liberty. Checks ordered from other sources may not work. See Ordering Computer Checks from Resaleworld for more information. **Dot matrix** checks only work in dot matrix printers. **Quicken** checks have a check at the top of an 8½ x 11 page, and two stubs below. **Laser** checks have a check in the middle of an 8½ x 11 page, with a stub above and a stub below. If you are hand writing a check or paying with cash, leave this option as is.

Copyright 2010, Resaleworld.com, Inc.

Related Topics

Pay Multiple Accounts

Cancel Check Printing

Printing Checks

CANCEL CHECK PRINTING

To Cancel Tag Printing

1. Select **Start** ➔ **Settings** ➔ **Printer**.
2. Right-click on the Check printer and select **Cancel All Documents**.

> ***Note:*** *Since the payout process has been initiated, the payments you started processing remain in memory until you reprint the checks and post them. If you want to remove one or all of the payouts in memory and start over again, use the Void an Unposted Payment procedure or click the Back button in the Account Payments routine a sufficient number of times to return to the Prepare Account Payments dialog, then start over.*

Related Topics

Printing Checks

Ordering Computer Checks from Resaleworld

Restart Check Printing

Pay One Account

Pay Multiple Accounts

Void an Unposted Payment

Copyright 2010, Resaleworld.com, Inc.

PRINT AN INVENTORY LIST (ITEM LIST)

Inventory Module ➔ *Item Entry Screen* ➔ *Print Item List Button*

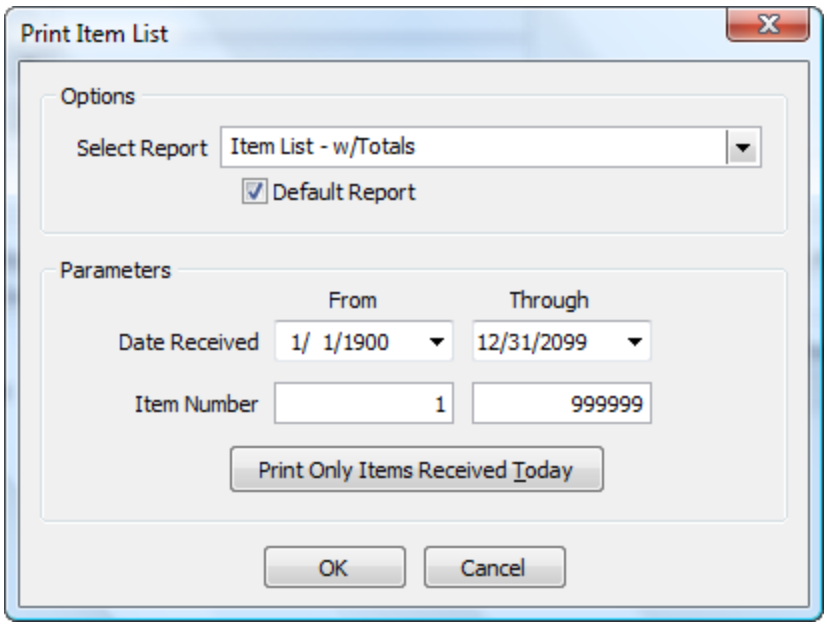
The **Item List - Drop Off** report contains a list of some or all of the items the client is consigning or selling to the store.

When printing an Item List, you may choose to print all items, a range of items based on the item numbers, a range of items based on their date received, etc.

To Print an Item List:

1. Lookup the account you wish to print an item list for.
2. Click on the **Print Item List** button, or

   Select **Task** ➔ **Print** ➔ **Print Item List**. The **Print Item List** dialog will display.



***Note**: No matter what Account or Item Entry window you are viewing, the **Print Item List** menu option appears under the Task button.*

3. Enter the necessary parameters in the **Print Item List** dialog. Refer to the information below to learn more about the fields in this dialog box:

Print Item List Dialog Fields

Select Report	Select the type of **Item List** to print from the drop-down. There are three Item Lists to choose from: • Item List with Totals • Item List – Sales Recap • Auction Drop Off Item List Select the type of report to print from the **Select Report** drop-down. If you are not sure which report to print, when you reach the Report Setup dialog choose **Preview**. This allows you to see the contents and layout of the report selected before printing.
Default Report	With the report used most frequently displayed in the Select Report drop-down (above), put a check in the Default Report check box. This will cause the preferred report to be selected automatically.
Date Received	From and through dates (date items' received) for items to be included in the list. Items are not printed for items with a date falling outside the range entered. Enter the dates in MM/DD/YYYY form using the keyboard, or click on the drop-down and select the dates from the calendar.
Item Number	From and through item numbers for items to be included in the list. Items are not printed for items with an item number falling outside the range entered.
Print Only Items Received Today	Click this button to change the from and through Date Received parameters (above) to today's date.

4. Select **OK** to print the report. The **Report Setup** dialog will appear.
5. Select the **Report Destination** (Printer, Preview, or File).
6. Select the number of copies of the Item List to print in the **Copies** field.
7. Select **OK**.

***Helpful Tip**: At the conclusion of entering items, stay in the Item Entry screen (don't click the Close button). By selecting **Task** → **Print Item List** while still in the Item*

Entry screen, Liberty will remember the item number you started with so you don't have to enter it.

Related Topics

Select Printers & Printing Defaults

PRINT A PICK LIST

Inventory Module → Task → Print → Pick List

Pick Lists are handy in two different situations. One is when an item or items sell at auction and you wish to print a list of the items to pull from inventory to start the shipping process. The second is when it is time to remove unsold items from inventory.

When printing a Pick List for unsold items, whether or not items are included in the Pick List depends upon the date they were received and the Pickup Period specified for the items' Price Codes.

Example: 2 items are brought in on January 1st. Item #1 and #2 have Price Code A. Item #3 has Price Code B. The Pickup Period for Price Code A is 90 days. The Pickup Period for Price Code B is 0.

Item #1 sells. Item #2 and item #3 do not sell.

A Pick List is run April 15th (approximately 105 days later). Item #1 is not listed on the Pick List because it sold. Item #2 is listed on the Pick List because more than 90 days have transpired since item #1 was received. Item #3 is not listed on the Pick List because setting the Pickup Period to 0 disables all Pickup Date functionality, including a) listing the pickup date on the Item List and b) listing an unsold item on a Pick List.

To Print a Pick List

1. Lookup the account.
2. Select **Task → Print → Pick List**.

Copyright 2010, Resaleworld.com, Inc.

3. Enter the necessary parameters in the **Print Pick List** dialog. Refer to the information below to learn more about the fields in this dialog box:

Print Pick List Dialog Fields

Date Received	From and through dates (date items received) for items to be included in the list. Items are not printed for items with a date falling outside the range entered.
Item Number	From and through item numbers for items to be included in the list. Items are not printed for items with an item number falling outside the range entered.
Print Only Items Received Today	Do Not Use.

Related Topics

Print an Account Activity Report

Select Printers & Printing Defaults

PRINT AN ACCOUNT ACTIVITY REPORT

Inventory Module ➔ *Task* ➔ *Print* ➔ *Account Activity*

The Account Activity report lists items sold and includes a financial summary at the bottom of the report.

To Print An Account Activity Report:

1. Lookup the account.
2. Select **Task** ➔ **Print** ➔ **Account Activity**.

3. Enter the necessary parameters in the **Print Activity List** dialog. Refer to the information below to learn more about the fields in this dialog box:

Print Activity List Report Dialog Fields

Date Received	From and through dates (date items received) for items to be included in the list. Items are not printed for items with a date falling outside the range entered.
Item Number	From and through item numbers for items to be included in the list. Items are not printed for items with an item number falling outside the range entered.
Print Only Items Received Today	Click this button to change the from and through Date Received parameters (above) to today's date.

Related Topics

Print a Pick List

Select Printers & Printing Defaults

Print a Donor Receipt

Inventory Module → *Task* → *Print* → *Donor Receipt*

The **Donor Receipt** is a list of items marked as Donated. Printing a Donor Receipt for a client provides the client with a donation record for tax filing purposes.

To Print a Donor Receipt:

1. Lookup the account.
2. Select **Task** → **Print** → **Donor Receipt**.

Copyright 2010, Resaleworld.com, Inc.

3. Enter the necessary parameters in the **Print Report** dialog. Refer to the information below to learn more about the fields in this dialog box:

Print Activity List Report Dialog Fields

Date Received	From and through dates (date items received) for items to be included in the list. Items are not printed for items with a date falling outside the range entered.
Item Number	From and through item numbers for items to be included in the list. Items are not printed for items with an item number falling outside the range entered.
Print Only Items Received Today	Click this button to change the from and through Date Received parameters (above) to today's date.

Related Topics

Post an Item as Returned, Donated, or Other

Post a Range of Items as Returned, Donated, or Other

Print Transaction History

Inventory Module → *Task* → *Print Transaction History*

Print a history of a single account's transactions by selecting **Print Transaction History**. For more power and flexibility, such as to generate a report of Transactions in multiple accounts, use Liberty Reports.

Copyright 2010, Resaleworld.com, Inc.

To Print a Transaction History for One Account

1. Lookup the account you wish to print a Payout History.
2. Select **Task** ➔ **Print** ➔ **Print Payout History**.

> ***Note**: No matter what Account or Item Entry window you are viewing, the **Print Transaction History** menu option appears under the Task button.*

Related Topics

View Transaction History

PRINT PAYOUT HISTORY

Inventory Module ➔ *Task* ➔ *Print* ➔ *Print Payout History*

The Payouts tab displays a history of all payments made to a particular consignor. Two reports are available:

1. The **Payout History** report, which prints a list of all payouts made to the consignor, and
2. The **Payment Detail** report, which shows all of the transactions comprising a particular payout.

For more power and flexibility, such as to generate a report of Payouts in multiple accounts, use Liberty Reports.

To Print a Payout History for One Account

1. Lookup the account you wish to print a Payout History.
2. Select **Task** ➔ **Print** ➔ **Print Payout History**.

*Note: No matter what Account or Item Entry window you are viewing, the **Print Payout History** menu option appears under the Task button.*

To Print a Payment Detail Report

1. Lookup the account.
2. Select the **4.Payouts** tab.
3. In the top half of the display, highlight the payout to be reported on. Notice that the payment detail for the payout appears in the bottom half of the display.
4. Select **Task** → **Print** → **Print Selected Payment Detail**.

Related Topics

View Payout History

Print an Invoice for an Online Order

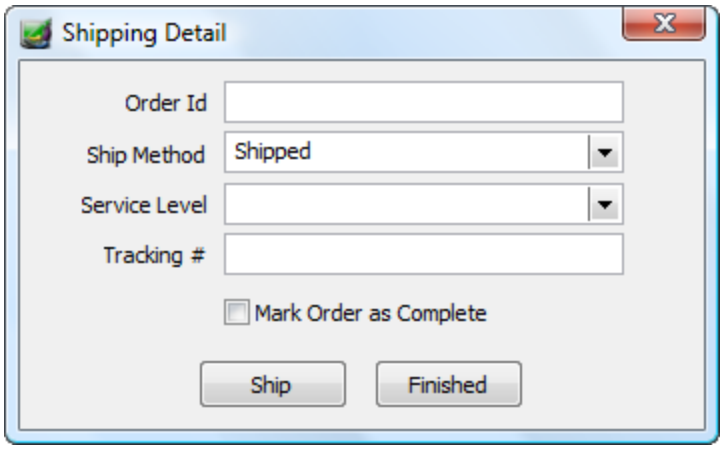
>Liberty Order Manager → Files → Ship Multiple Orders

The most efficient method of marking orders as shipped is to use the **Ship Multiple Orders** routine. This routine allows you to scan both the barcode printed on the invoice and the barcode printed on the Shipping Label. Doing so speeds the information entry process.

If you are using UPS Worldship for shipping your packages, Liberty can integrate directly into Worldship to allow even faster, easier package processing. Please see the Appendix for more information about **UPS Worldship** integration.

To Ship Multiple Orders:

1. Start the Order Manager module.
2. From the **Main Menu** select **Files** → **Ship Multiple Orders**. The Shipping Detail dialog will display:



3. Scan the **Order ID** barcode on the **Invoice** using a barcode reader. (See the section entitled Printing an Invoice for information on printing invoices.) Upon scanning the bar-code the **Shipping Method** and **Service Level** fields will be automatically populated.
4. Scan the barcode from the UPS shipping label to populate the **Tracking #** field.
5. To complete the order, select the **Mark Order as Complete** check box.

   Marking an order as **Complete** tells the system this order has been paid and shipped and will calculate all the necessary transactions in order to pay a consignor. If you do not mark an order as Complete, your consignor will not be paid for any of the items that have been sold on eBay.

   > ***Note:*** *Use the Pay Delay feature, located in Liberty under Tools → Options → 3 – Payouts to delay payment to the consignor until sufficient time has elapsed from the date of the sale. Please see the section entitled Set Payment Defaults * Set_Payout_Preferences > Main for more information.*

6. To mark the order as shipped either:
   a. Click the **Ship** button, or
   b. Press the <**F10**> key on your keyboard.

After each order is marked as shipped the Ship Multiple Orders dialog will return to an empty state, ready for the next Invoice to be scanned to enter the Order ID. Note that the **Send Email Notification** and **Mark Order as Complete** options will carry forward to the next order.

Copyright 2010, Resaleworld.com, Inc.

Reports

Copyright 2010, Resaleworld.com, Inc.

LIBERTY REPORTS OVERVIEW

Liberty has a number of reports you can run to manage your store more efficiently, from end-of-day reporting to sales history by item.

To the casual observer the various report routines probably appear complex and uninviting. Yet the reports contained in Liberty are not difficult to learn, and used properly can help increase profitability. By exercising a little effort, the reports will provide you with a tremendous amount of power.

Instructions contained herein focus on teaching the underlying principles which govern how reports are generated. Learn the basic concepts and you will be able to easily generate any report.

The best way to learn how to use reports is to experiment. Many people operate under the mistaken belief that running reports might somehow harm the information in their system. This is incorrect. Reports only *look* at the data contained in the system - they don't change it. The information is then put into a format that makes sense.

> ***Note**: When accessing reports from Liberty's main menu, all reports are displayed in the Reports screen. When accessing reports from the PoS module, only PoS related reports are available.*

The First Concept to Understand When Generating a Report

> ***Note:** If you do not change any of the Report's settings (**parameters**), the report will include every item on file that fits the type of report being run.*

For instance, if you run a sales report without changing any of the settings, you'll get a list of *every* single item ever sold with the system. This might be fine if you've been using the system for a few days, but not when you've used it for several years.

Generating a useful report requires eliminating the stuff you don't want from the report. This is known as **Filtering** the report. Filtering means taking a lot of information and reducing it to just what you want.

Copyright 2010, Resaleworld.com, Inc.

To explain further, consider a sales report. A sales report by definition should provide a list of items that have sold. When you look at the Report dialog for an **Item Description with Sales History** report, you see all of the following parameters:

Selling Price	Account Number
Item Received Date	Category
Item Sold Date	Filter Code
Price Code	Account Type

Notice the Item Sold Date's **Operator** field contains the term **All** by default. This means that all sales, regardless of date, will be included in the report. This is not very useful.

Change the Operator to **Between** and enter a from and through date and then you have a useful report.

It's as simple as that!

Related Topics

Starting Liberty Reports

Create a Report

Select a Report

Setting Report Parameters

Printing Reports

View History of Account Purchases

Sending Batch Emails to Clients

STARTING LIBERTY REPORTS

Inventory Module ➔ *Reports* ➔ *Reports*

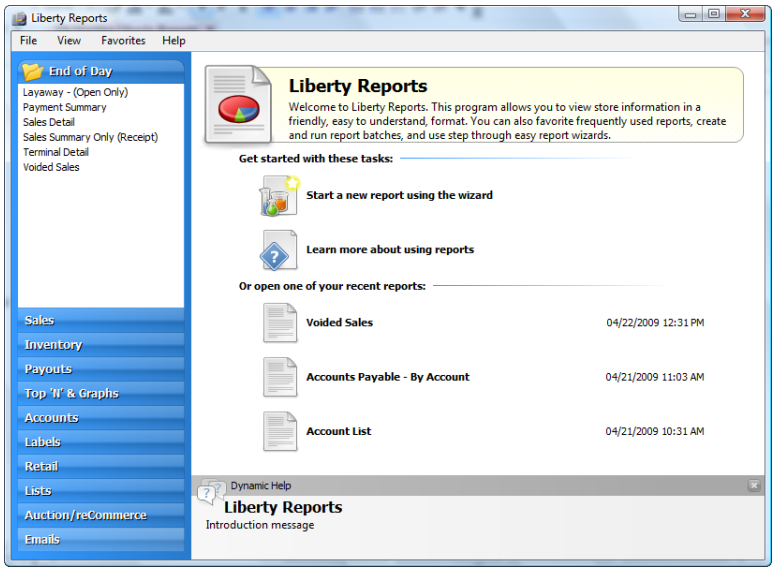
To Start Liberty Reports:

Do any of the following:

Copyright 2010, Resaleworld.com, Inc.

1. Click on the **Reports** icon at the top of the screen in the Inventory Module, or
2. Select **Reports** → **Reports** from the Main Menu in Liberty Inventory, or
3. Select **Start** → **Programs** → **Liberty4 Trading Assistants** → **Liberty Reports Module**.

   The **Reports Module** will display:


Liberty Reports
File View Favorites Help
End of Day
Layaway - (Open Only)
Payment Summary
Sales Detail
Sales Summary Only (Receipt)
Terminal Detail
Voided Sales
Sales
Inventory
Payouts
Top 'N' & Graphs
Accounts
Labels
Retail
Lists
Auction/reCommerce
Emails
Liberty Reports
Welcome to Liberty Reports. This program allows you to view store information in a friendly, easy to understand, format. You can also favorite frequently used reports, create and run report batches, and use step through easy report wizards.
Get started with these tasks:
Start a new report using the wizard
Learn more about using reports
Or open one of your recent reports:
Voided Sales 04/22/2009 12:31 PM
Accounts Payable - By Account 04/21/2009 11:03 AM
Account List 04/21/2009 10:31 AM
Dynamic Help
Liberty Reports
Introduction message

> ***Note**: When accessing reports from Liberty's main menu, all reports are displayed in the Reports screen. When accessing reports from the PoS module (PoS → Reports), only PoS related reports are available. When accessing Client reports in Inventory Module by clicking on the Task button, only Client related reports are displayed.*

Related Topics

Liberty Reports Overview

Select a Report

Emailing Clients

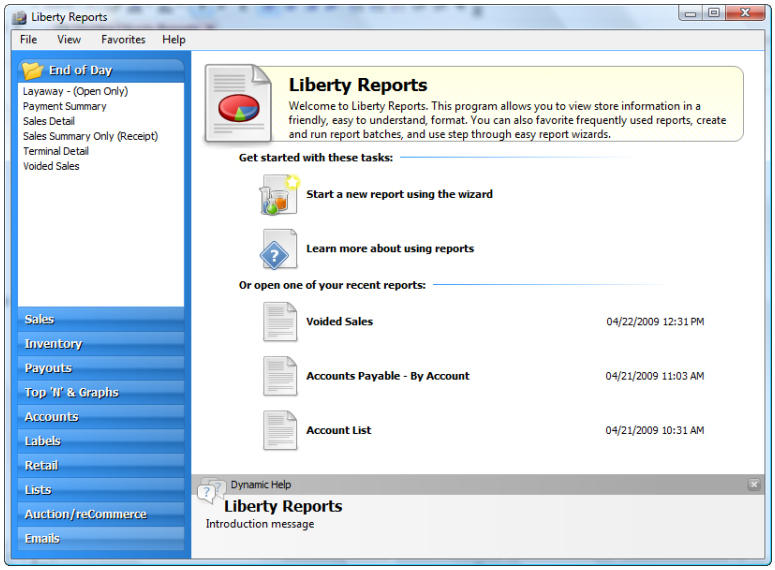
Copyright 2010, Resaleworld.com, Inc.

CREATE A REPORT

Inventory Module → *Main Menu* → *Reports*

To Create a Report

1. From the main menu of Liberty Inventory, click the **Reports** button in the toolbar. The **Liberty Reports** module will display:


Liberty Reports
File View Favorites Help
End of Day
Layaway - (Open Only)
Payment Summary
Sales Detail
Sales Summary Only (Receipt)
Terminal Detail
Voided Sales
Sales
Inventory
Payouts
Top 'N' & Graphs
Accounts
Labels
Retail
Lists
Auction/reCommerce
Emails
Liberty Reports
Welcome to Liberty Reports. This program allows you to view store information in a friendly, easy to understand, format. You can also favorite frequently used reports, create and run report batches, and use step through easy report wizards.
Get started with these tasks:
Start a new report using the wizard
Learn more about using reports
Or open one of your recent reports:
Voided Sales 04/22/2009 12:31 PM
Accounts Payable - By Account 04/21/2009 11:03 AM
Account List 04/21/2009 10:31 AM
Dynamic Help
Liberty Reports
Introduction message

2. Click on the **Report Category** in the left-hand pane to view the available report types.
3. Select the type of report to run.
4. Select parameters to limit the records included in the report.
5. If needed, change the Report Options, Sort Parameters, and/or Color Selection.
6. Click on the **Preview** button to verify you have set up the report you need, and/or Click on the **Print** button to print the report.

> ***Note**: You must first close the Print Preview screen before changing any report parameters or running another report.*

Related Topics

Starting Liberty Reports

Copyright 2010, Resaleworld.com, Inc.

Create a Report

Select a Report

Set Report Parameters

Set Report Options & Colors

Printing Reports

SELECTING THE RIGHT REPORT

Inventory Module ➔ *Reports* ➔ *Reports*

Use the table below to select the right report for your needs. The reports listed are divided by Report Category (sales, inventory, payout, etc.), with each report name listed in the order it appears in the program. For more information such as the available report criteria or to view a sample report, click the report name below:

Report Types

Report Name	Report Purpose
End of Day Reports	
Payment Summary Report	Reports the details of PoS transactions with an emphasis on payment type information.
Sales Detail Report	Reports the details of PoS transactions with an emphasis on the items contained in each sale. Use to view details of particular sales for auditing sales; total taxable/nontaxable sales; sales by user; Web sales detail (select the Status parameter Finished Web to view Web Sales detail).
Sales Summary Only (Receipt)	Displays sales summary and payment summary information. This report is formatted for a PoS receipt printer and is used in the Cash Drawer Report accessible through the Point of Sale system.
Layaway (Open Only)	Displays all current open layaways entered through Point of Sale.
Terminal Detail	View sales by PoS terminal (cash register).
Today's Sales Details	Variation of Sales Detail that will only show sales numbers from the current day.
Voided Sales	This report displays all sales that were voided during the Point of Sale process. This report is the only way to find information about voided sales.
Sales (Inventory) Reports	
Item Description with Sales History	Report on sale of merchandise for a specific time period. Displays all transactions including sales and returns related to each inventory item in each account.
Profit by Brand	Displays sales by Brand with both detail and summary information.
Profit by Category	Displays gross profit totals by category. Report may be generated to show profits at any Category Level (1, 2, or 3). Also shows average days until items in a Category sell (also known as aging or turnover rate) and the number of items sold for each category.
Profit by Section	This report groups all sales information by store section.
Purchases by Customer Report	Display sales details for customers, including purchase dates and prices.

Copyright 2010, Resaleworld.com, Inc.

Report Name	Report Purpose
Purchases by Zip/Postal Code Report	This report summarizes all customer purchases by Postal/Zip Code.
Sales By Account	View sales sorted by account.
Sales by Category	View sales on a category by category basis. Reports on any category and any category level. Particularly useful for analyzing sales by category to determine what categories are most profitable, sell the fastest, etc. See also the section entitled Grouping Categories Into Product Lines
Sales by Product Line	Displays sales detail broken down by Product Line. The primary sort is by Product Line, and then items are secondarily sorted by Category.
Sales Commission	Displays sales detail information for each sales person, with a breakdown of price sold, profit and commission amounts.

Sales (Non-Inventory) Reports

Coupon Summary	Displays a list of all coupons, including a sales record of each time a coupon is used.
Gift Card Transaction History	Displays all transactions for each Gift Card.
Sales Fee Detail	This report shows all non-inventory fee transactions related to sales for a given time period.

Inventory Reports

Donor Receipt	The **Donor Receipt** is a list of items marked as Donated. Printing a Donor Receipt for a client provides the client with a record of donations for tax filing purposes.
Expired Group	Groups all sold items that have been posted to an expired account as a result of the expiration date.
Inventory by Category	This report displays all inventory by each category and summarizes the quantity, price, and cost of available items.
Item Description--Long Format	View a list of items for an account with their full item descriptions displayed.

Copyright 2010, Resaleworld.com, Inc.

Report Name	Report Purpose
Item Description by Account	Generate lists of items for an account.
Item Received Summary	This report summarizes key information for items received within a certain time frame.
Item Sales Summary	This report summarizes key information for items received within a certain time frame.
Markdown	Provides a report showing the markdown schedule for each item in the report.
Web Inventory Detail	View all web related information about items posted for sale on the Web.

Payouts Reports

Accounts Payable By Account or By Last Name	View outstanding account liabilities. Use this report to determine how much is owed to Account Holders of consigned items. This report differs from the Transaction Detail in that it shows only consigned items which have sold but the Account Holder has not yet been paid, plus deductions and credits to the account. There are two ways to sort this report: By Account and By Last Name.
Transaction Detail	View all account transactions (items sold, refunded, credits, deductions, etc.).
Check/ Payout Detail	View the details of an account payment (gross sales less deductions, plus credits).
Check/Payout Detail - Extended	Identical to Check/Payout Detail Report, with two additional columns: Price Sold and the Description for transactions specific to a particular item.

Top "N" & Analysis Reports

Hourly Sales	Displays all sales summary information, broken down by hour, and by day of the week.
Category/Brand Analysis	This report generates a cross-tab report organizing sales by both category and brand. The grid shows sales summary information (number of sales, average sale, and total sales) for each combination of category and brand.
Category/Color Analysis	This report generates a cross-tab report organizing sales by both category and color. The grid shows sales summary information

Copyright 2010, Resaleworld.com, Inc.

Report Name	Report Purpose
	(number of sales, average sale, and total sales) for each combination of category and color.
Category/Size Analysis	This report generates a cross-tab report organizing sales by both category and size. The grid shows sales summary information (number of sales, average sale, and total sales) for each combination of category and size.
Top Selling Brands (Graphs)	This report gives you a visual representation of the top selling brands by total price sold for a given time period.
Top Selling Categories (Graph)	This chart is a visual representation of the top selling categories.
Top Selling Sizes (Graph)	This report gives you a visual representation of the best selling 'sizes' for a particular time period.
Top Slowest Selling Categories	Displays a graph of the average days to sell for up to ten categories.

Accounts Reports

Account Comments	View account comments (Notes) for one or more accounts.
Account List	Displays account Information including address and Phone number. Information for each account appears on just one line, so this report is much shorter than the Account List - Full Detail report. Select the Sort button to choose to generate the report in order of Account or Last Name.
Account List - Full Detail	Displays account Information including primary address, phone number, e-mail and company name. This is a lengthy report - the Account List report shows less information, but is much shorter report as well.
Account List by Filter Code	View filter code assigned to each account.
Account Productivity	Summarizes the matriculation (success rate) by account.
Reward Plan List Report	This report will give you a list of all reward plans and enrollees.
User Fields	View user fields defined for each account.
Wish List	View active requested wishes.

Copyright 2010, Resaleworld.com, Inc.

Report Name	Report Purpose
Wish List Cross Reference	This report cross references active and current wishes with current inventory to displays available matches, and shows detailed item information for matches.

Labels Reports

Labels by Total Purchases Report	Prints labels for store customers based on their amount purchased.
2 Across Mailing Labels	Prints mailing labels on the 2 across thermal sticky labels available from Resaleworld. They will print on either an Eltron Orion or 2722 Thermal Printer. Select the Sort button to choose to print labels in order of Account, Last Name, or Zip Code.
3 Across (5160) Mailing Labels	Print mailing labels on 8 ½ x 11 sheets in a laser or ink jet printer. Label size meets Avery 5160 specifications (2 ½ x 15/16, 3 across). Select the Sort button to choose to print labels in order of Account, Last Name, or Zip Code.

Retail Reports

Retail Inventory	Displays all retail inventory products with detailed information on each product.
Retail Inventory with Order History	Displays order history information for selected retail items.
Retail Items Reorder	Displays any retail items that require reordering based on minimum quantity and quantity on hand levels. Also displays the recommended purchase order amount based on the minimum purchase level.
Retail Sales History	Displays all sales history detail for each retail item sorted by account.
Retail Sales Summary	Provides a summary of retail sales in a convenient format.

List Reports

Category List	Lists active categories.

Copyright 2010, Resaleworld.com, Inc.

Report Name	Report Purpose
Category List with Attributes	Lists active categories with their attributes.
Price Code	Displays information for each price code. All markdown information and time periods will be displayed.
Tax Type	Displays all tax types with each Tax Type's parameters.

Auction/reCommerce Reports

Auction Sales	Displays sales information for closed auctions.
Auction Status	Displays the status of information on both currently running and closed auctions.
Order Detail	This report displays the basic order details such as the invoice number, date of the order, web order ID, and purchasers" email addresses.
Order Pick List	This report shows all orders which have been paid and need to be shipped. It is designed to aid the process of selecting items in need of shipping.

Item Lists

Note: The Item List reports are not run from the Report Module like the rest of the reports on this page. The Item List Reports are printed from the Item Entry screen. For more information on printing Item List reports, please refer to Print an Inventory List (Item List) topic.

Item Lists with Totals	Includes Description, Item Status, Price, Price Code, Quantity, Cost, and Pickup Date.
Item Lists without Totals	Includes Description, Price, Price Code, Cost, and Pickup Date. Does not total up Price or Cost.
Item List Sales Recap	Includes Category, Orig Price, Price Code, Date Sold, Price Sold, Net, Status/Disp, Description, and Pickup Date.
Item Lists with Markdowns	Includes Category, Price, Price Code, and the dates and amounts from each item's markdown schedule.
Item Lists with Retails Price (available)	Variation of Item List w/ Totals that replaces the Cost field with the Retail Price field. Only shows/totals retail price of items currently available.
Item Lists with Retails Price (all)	Variation of Item List w/ Totals that replaces the Cost field with the Retail Price field. Shows/totals retail price of all listed items,

Copyright 2010, Resaleworld.com, Inc.

Report Name	Report Purpose
	whether or not the item is available.
Item List Email Report	Emails the item list to the customer. Includes Price, Price Code, Quantity, Cost, and Pickup Date.
Auction Dropoff Report	Intended for items brought it to be listed on Ebay. Includes Buy It Now, Duration, Reserve, Starting Bid, Valuation, MSRP, Price Code, Auction ID.

Email Reports

> ***Note:*** *Before automated emails may be sent using any of the following reports, be sure to:*

1. *Specify the Outgoing (SMTP) Mail Server, and*
2. *Customize the Email Headers and Footers to show relevant information at the beginning and end of each email.*

> *Both steps are accomplished under* ***Tools*** → ***Ecommerce Options*** → ***Email Settings****.*

Additional information on Email Reports may be found in the section entitled Emailing Clients.

Closed Auctions Email	This report will generate an email to each account displaying closed auction information with a link to the auction.
Open Auctions Email	This report will generate an email to each account displaying auction information with a link to the auction.
Open Orders Email	Use this email when you need to remind customers that they have not paid for their orders. Be sure to filter this report so that you do not send every customer an email.
Payout Detail Email	Emails payout and payout detail to each consignor. Information in the email is grouped by payout numbers.
Transaction History Email	Emails a list of all open transactions to each consignor. (An open transaction is one where the transaction has not yet been included in the calculation of a payout to the consignor.)

Custom

> ***Note****: Resaleworld can create custom reports for you. Contact Resaleworld for more information.*

Copyright 2010, Resaleworld.com, Inc.

Report Name	Report Purpose

Related Topics

Sending Batch Emails to Clients

Create a Report

Set Report Parameters

Printing Reports

Sending Automated Emails with the Event Manager

LAYAWAY REPORT (OPEN ONLY)

Inventory Module → *Reports* → *Reports* → *End of Day*

Displays all currently open layaways entered through Point of Sale. The entry for each open layaway includes the itemized sale and any payments received.

When to Use:

This report is the only way to find information about open layaways aside from selecting them individually from PoS. The amount of payments collected for open layaways is often needed for tax purposes.

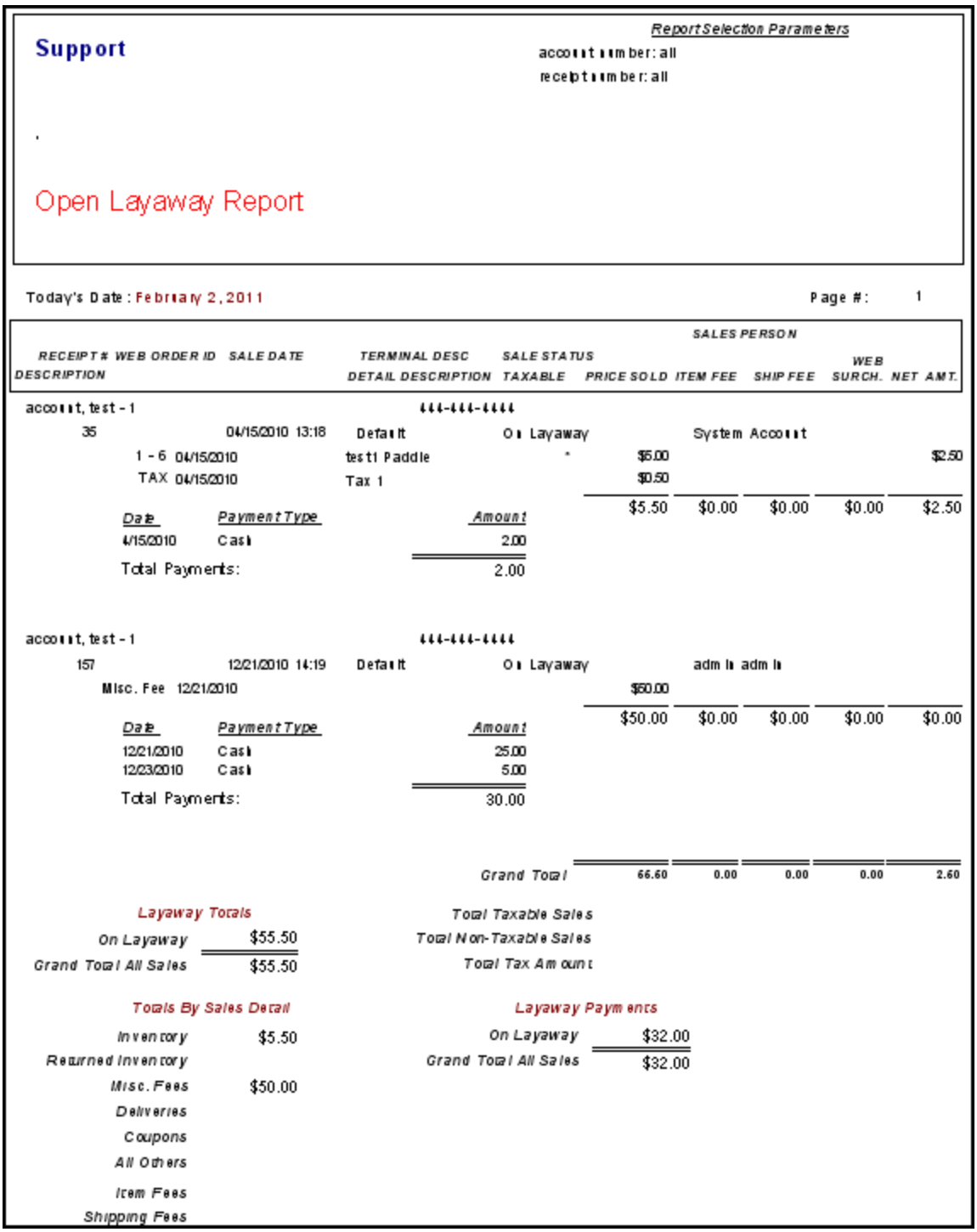
Criteria Choices:

- Account Number
- Receipt Number

Sample Report

To view a sample of the Layaway Report, click here.

Copyright 2010, Resaleworld.com, Inc.



Support

Report Selection Parameters
account number: all
receipt number: all

Open Layaway Report

Today's Date : February 2, 2011 Page #: 1

RECEIPT # / DESCRIPTION	WEB ORDER ID	SALE DATE	TERMINAL DESC / DETAIL DESCRIPTION	SALE STATUS / TAXABLE	SALES PERSON	PRICE SOLD	ITEM FEE	SHIP FEE	WEB SURCH.	NET AMT.
account, test - 1			444-444-4444							
35		04/15/2010 13:18	Default	On Layaway	System Account					
1 - 6		04/15/2010	test1 Paddle	*		$5.00				$2.50
TAX		04/15/2010	Tax 1			$0.50				
						$5.50	$0.00	$0.00	$0.00	$2.50

Date	Payment Type	Amount
4/15/2010	Cash	2.00
Total Payments:		2.00

account, test - 1			444-444-4444							
157		12/21/2010 14:19	Default	On Layaway	admin admin					
Misc. Fee		12/21/2010				$50.00				
						$50.00	$0.00	$0.00	$0.00	$0.00

Date	Payment Type	Amount
12/21/2010	Cash	25.00
12/23/2010	Cash	5.00
Total Payments:		30.00

				Grand Total		66.60	0.00	0.00	0.00	2.60

Layaway Totals

On Layaway	$55.50
Grand Total All Sales	$55.50

Total Taxable Sales	
Total Non-Taxable Sales	
Total Tax Amount	

Totals By Sales Detail

Inventory	$5.50
Returned Inventory	
Misc. Fees	$50.00
Deliveries	
Coupons	
All Others	
Item Fees	
Shipping Fees	

Layaway Payments

On Layaway	$32.00
Grand Total All Sales	$32.00

Related Topics

Selecting the Right Report

PAYMENT SUMMARY REPORT

Inventory Module → Reports → Reports → End of Day

Displays all payments made against each sale and displays a summary by payment type.

Tip: Change the Suppress options to switch between showing individual payments by sale and only the Summary Information.

When to Use:

This report is the fastest way to find a breakdown of your payments received over a given time frame. It is also useful for tracking down a specific payment.

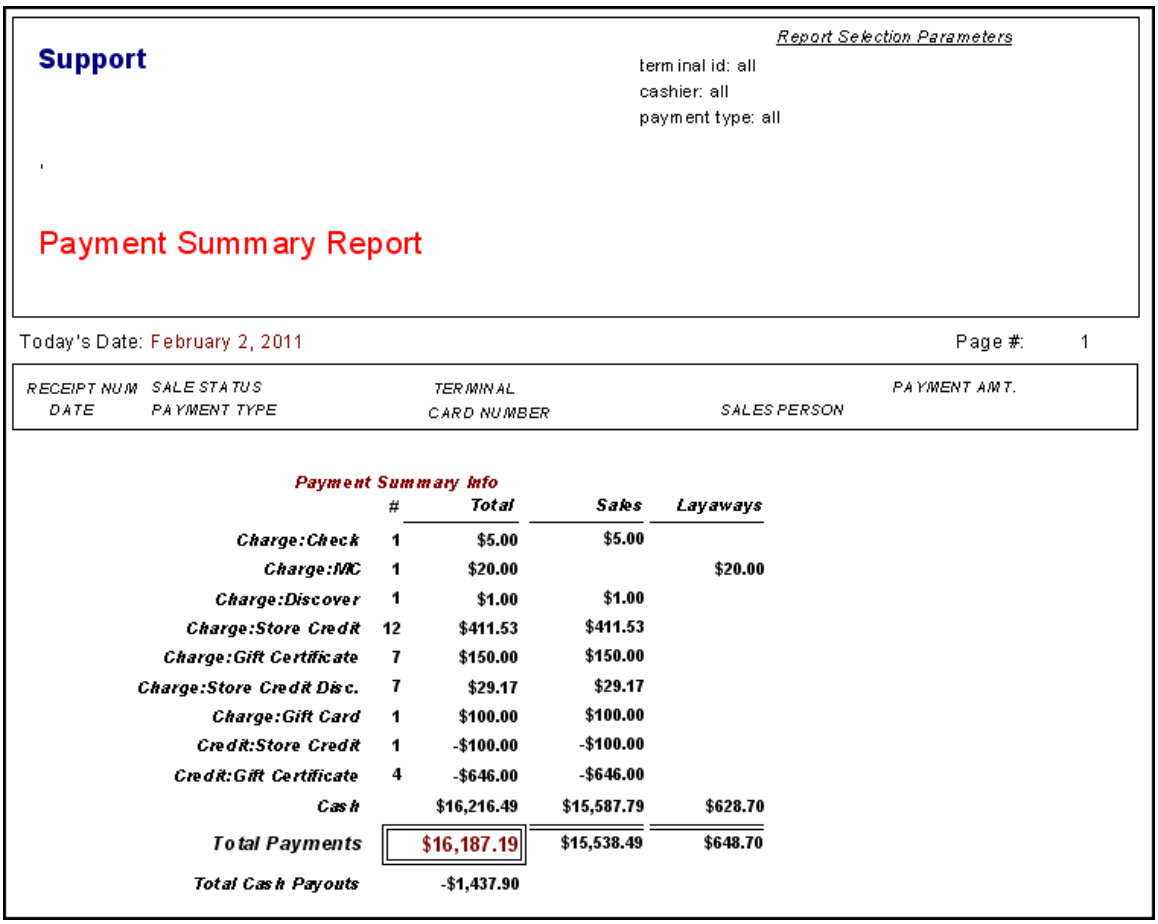
Criteria Choices:

- Terminal ID
- Cashier
- Payment Type
- Payment Date
- Sales Status

Sample Report

To view a sample of the Payment Summary Report, click here.

Copyright 2010, Resaleworld.com, Inc.



Support

Report Selection Parameters
terminal id: all
cashier: all
payment type: all

Payment Summary Report

Today's Date: February 2, 2011 Page #: 1

RECEIPT NUM / DATE	SALE STATUS / PAYMENT TYPE	TERMINAL / CARD NUMBER	SALES PERSON	PAYMENT AMT.

Payment Summary Info

	#	Total	Sales	Layaways
Charge:Check	1	$5.00	$5.00	
Charge:MC	1	$20.00		$20.00
Charge:Discover	1	$1.00	$1.00	
Charge:Store Credit	12	$411.53	$411.53	
Charge:Gift Certificate	7	$150.00	$150.00	
Charge:Store Credit Disc.	7	$29.17	$29.17	
Charge:Gift Card	1	$100.00	$100.00	
Credit:Store Credit	1	-$100.00	-$100.00	
Credit:Gift Certificate	4	-$646.00	-$646.00	
Cash		$16,216.49	$15,587.79	$628.70
Total Payments		$16,187.19	$15,538.49	$648.70
Total Cash Payouts		-$1,437.90		

Related Topics

Selecting the Right Report

SALES DETAIL REPORT

Inventory Module → Reports → Reports → End of Day

Displays each sale with sales information and payment detail information.

Copyright 2010, Resaleworld.com, Inc.

Tip: Change the Suppress options to switch between showing the details of each sale and only the Summary Page.

When to Use:

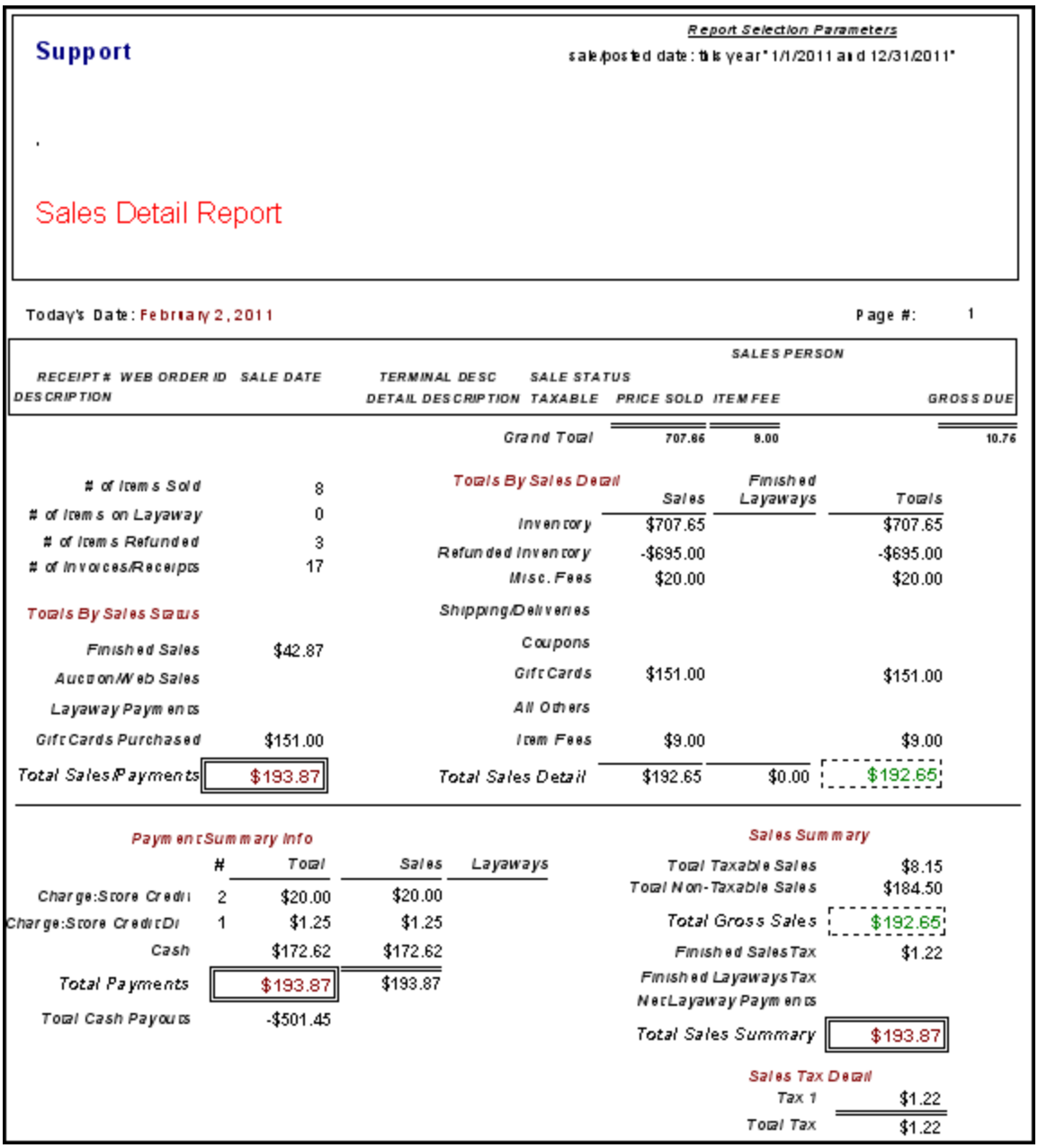
The Summary Page is a comprehensive overview of everything that happened at the PoS. The Detail Section is the only way to look at full sales once they have been completed.

Criteria Choices:

- Account Number
- Receipt Number
- Sale/Posted Date
- Sales Person
- Sales Status
- Tax Exempt Customers?
- Terminal ID

Sample Report

To view a sample of the Sales Detail Report, click here.



Support

Report Selection Parameters
sale/posted date: 'this year' 1/1/2011 and 12/31/2011'

Sales Detail Report

Today's Date: February 2, 2011 Page #: 1

RECEIPT #	WEB ORDER ID	SALE DATE	TERMINAL DESC / DETAIL DESCRIPTION	SALE STATUS / TAXABLE	SALES PERSON / DESCRIPTION	PRICE SOLD	ITEM FEE	GROSS DUE
			Grand Total			707.86	9.00	10.76

# of Items Sold	8
# of Items on Layaway	0
# of Items Refunded	3
# of Invoices/Receipts	17

Totals By Sales Status

Finished Sales	$42.87
Auction/Web Sales	
Layaway Payments	
Gift Cards Purchased	$151.00
Total Sales/Payments	$193.87

Totals By Sales Detail

	Sales	Finished Layaways	Totals
Inventory	$707.65		$707.65
Refunded Inventory	-$695.00		-$695.00
Misc. Fees	$20.00		$20.00
Shipping/Deliveries			
Coupons			
Gift Cards	$151.00		$151.00
All Others			
Item Fees	$9.00		$9.00
Total Sales Detail	$192.65	$0.00	$192.65

PaymentSummary Info

	#	Total	Sales	Layaways
Charge:Store Credi	2	$20.00	$20.00	
Charge:Store CreditDi	1	$1.25	$1.25	
Cash		$172.62	$172.62	
Total Payments		$193.87	$193.87	
Total Cash Payouts		-$501.45		

Sales Summary

Total Taxable Sales	$8.15
Total Non-Taxable Sales	$184.50
Total Gross Sales	$192.65
Finished Sales Tax	$1.22
Finished Layaways Tax	
Net Layaway Payments	
Total Sales Summary	$193.87

Sales Tax Detail

Tax 1	$1.22
Total Tax	$1.22

Related Topics

Selecting the Right Report

SALES SUMMARY ONLY (RECEIPT)

Inventory Module ➔ *Reports* ➔ *Reports* ➔ *End of Day*

Displays sales summary and payment summary information. This report is formatted for a POS receipt printer and is used in the Cash Drawer Report that can be accessed through the Point of Sale system.

Tip: This can be run directly from PoS by clicking **Reports**, then **Cash Drawer Totals**.

When to Use:

This contains the same information as the Sales Detail Report's Summary Page. This report allows you to print that information from a PoS computer that does not have a regular document printer.

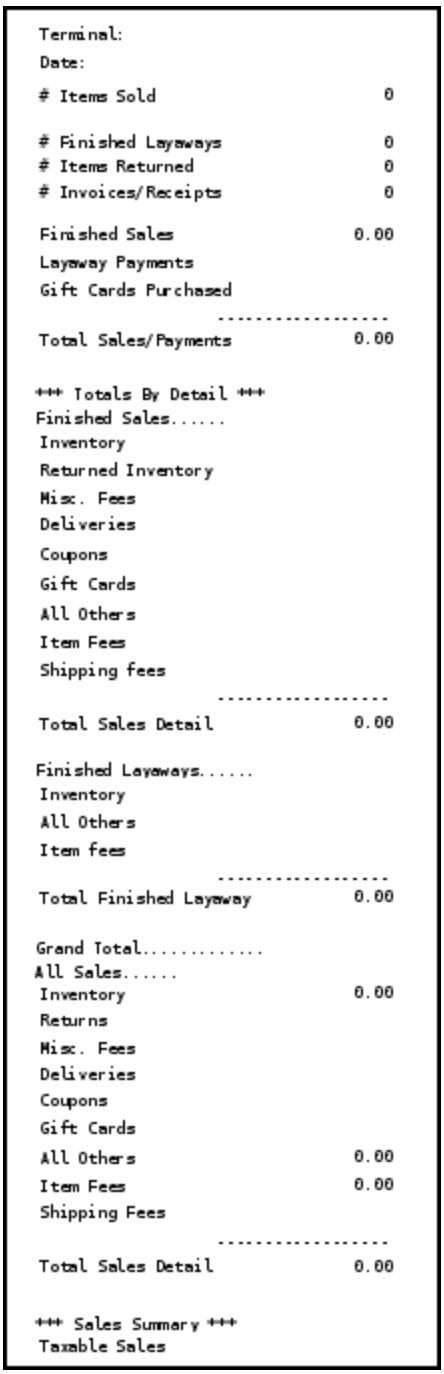
Criteria Choices:

- Terminal ID
- Sale/Posted Date
- Receipt Number
- Sales Person
- Sales Status

Sample Report

To view a sample of the Sales Summary Only Report, click here.

Copyright 2010, Resaleworld.com, Inc.



```
Terminal:
Date:
# Items Sold                    0

# Finished Layaways             0
# Items Returned                0
# Invoices/Receipts             0

Finished Sales                0.00
Layaway Payments
Gift Cards Purchased
                    ----------------
Total Sales/Payments          0.00

*** Totals By Detail ***
Finished Sales......
Inventory
Returned Inventory
Misc. Fees
Deliveries
Coupons
Gift Cards
All Others
Item Fees
Shipping fees
                    ----------------
Total Sales Detail            0.00

Finished Layaways......
Inventory
All Others
Item fees
                    ----------------
Total Finished Layaway        0.00

Grand Total.............
All Sales......
Inventory                     0.00
Returns
Misc. Fees
Deliveries
Coupons
Gift Cards
All Others                    0.00
Item Fees                     0.00
Shipping Fees
                    ----------------
Total Sales Detail            0.00

*** Sales Summary ***
Taxable Sales
```

Related Topics

Selecting the Right Report

TERMINAL DETAIL REPORT

Inventory Module → *Reports* → *Reports* → *End of Day*

Displays a summary of all tender types for each terminal.

When to Use:

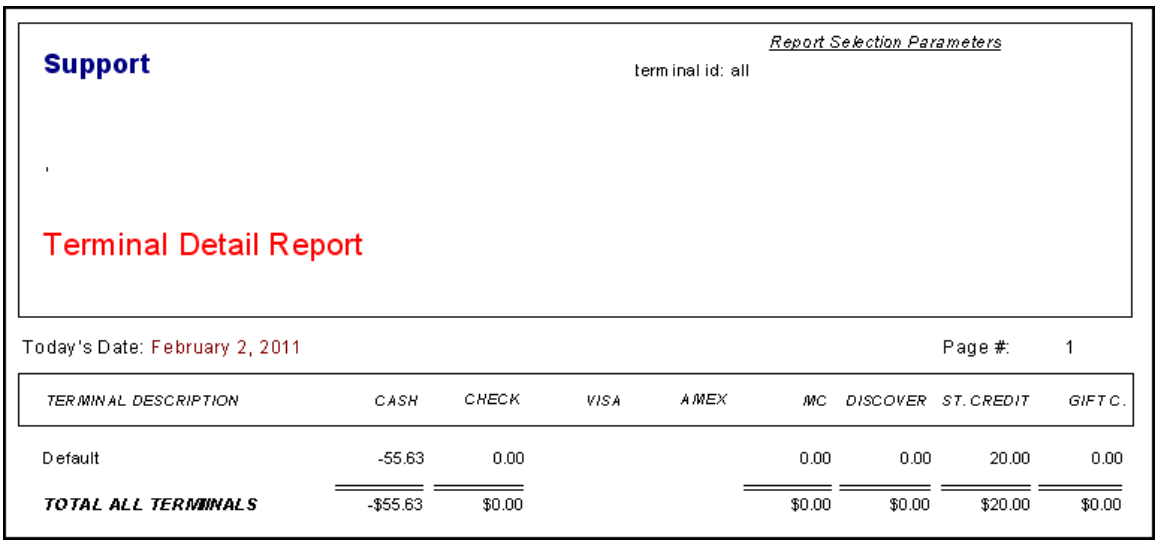
This report is allows users with more than one PoS station to view the Payment Summary information for each terminal.

Criteria Choices:

- None

Sample Report

To view a sample of the Terminal Detail Report, click here.



Support

Report Selection Parameters

terminal id: all

Terminal Detail Report

Today's Date: February 2, 2011 Page #: 1

TERMINAL DESCRIPTION	CASH	CHECK	VISA	AMEX	MC	DISCOVER	ST. CREDIT	GIFT C.
Default	-55.63	0.00			0.00	0.00	20.00	0.00
TOTAL ALL TERMINALS	-$55.63	$0.00			$0.00	$0.00	$20.00	$0.00

Related Topics

Selecting the Right Report

Copyright 2010, Resaleworld.com, Inc.

TODAY'S SALES DETAIL

Inventory Module → *Reports* → *Reports* → *End of Day*

Variation of the Sales Detail Report that only displays sales numbers from the current day.

When to Use:

This report can be set to require a lower level of security access than the Sales Detail report. This allows the daily numbers to be run by employees without giving them access to the full Sales Detail Report (and the store's full sales records).

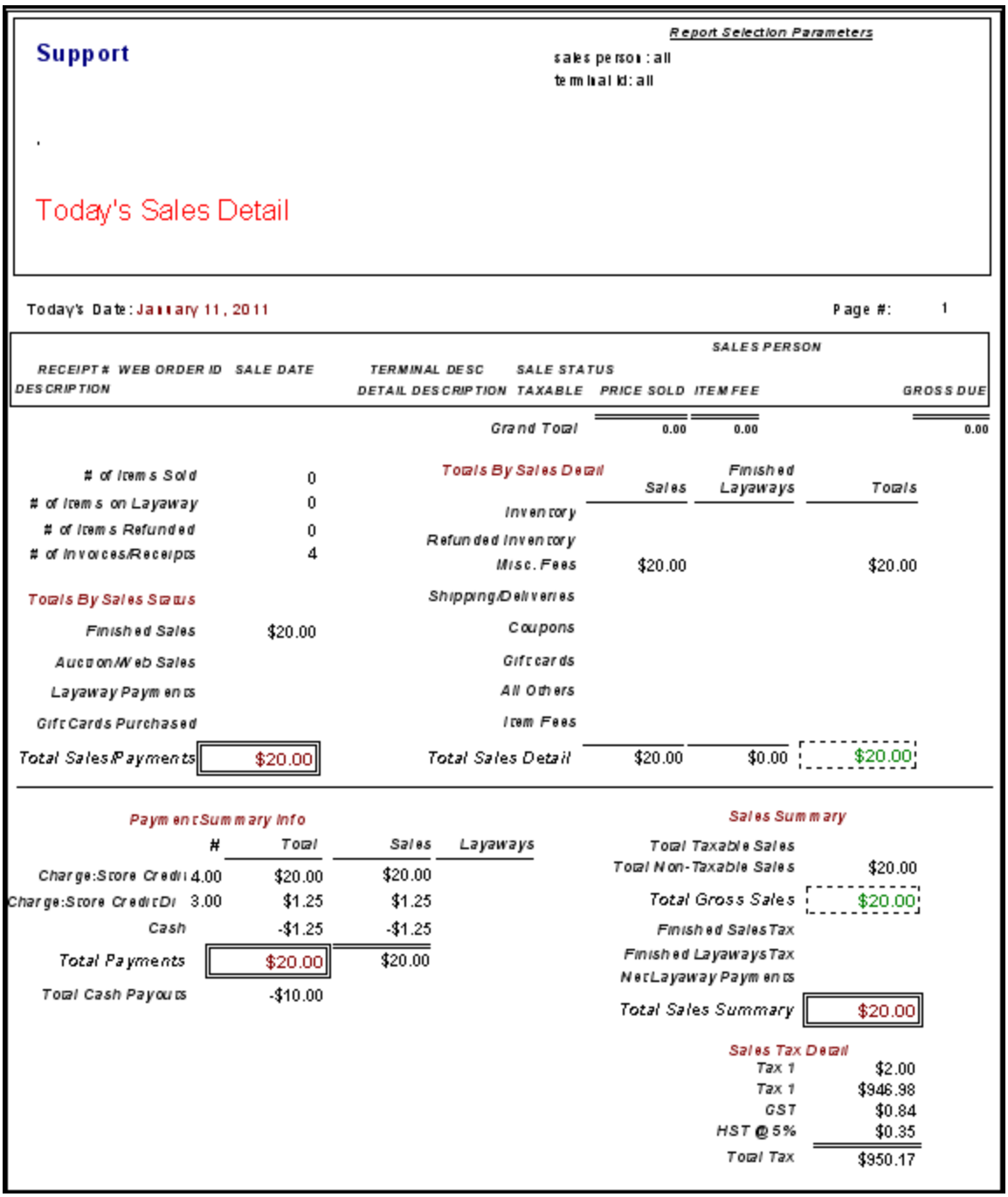
Criteria Choices:

- Sales Person
- Terminal ID

Sample Report

To view a sample of the Today's Sales Details Report, click here.

Copyright 2010, Resaleworld.com, Inc.



Support

Report Selection Parameters
sales person : all
terminal id: all

Today's Sales Detail

Today's Date: January 11, 2011 Page #: 1

RECEIPT #	WEB ORDER ID	SALE DATE	TERMINAL DESC	SALE STATUS	SALES PERSON		
DESCRIPTION			DETAIL DESCRIPTION	TAXABLE	PRICE SOLD	ITEM FEE	GROSS DUE
				Grand Total	0.00	0.00	0.00

# of Items Sold	0
# of Items on Layaway	0
# of Items Refunded	0
# of Invoices/Receipts	4

Totals By Sales Status

Finished Sales	$20.00
Auction/Web Sales	
Layaway Payments	
Gift Cards Purchased	
Total Sales/Payments	$20.00

Totals By Sales Detail

	Sales	Finished Layaways	Totals
Inventory			
Refunded Inventory			
Misc. Fees	$20.00		$20.00
Shipping/Deliveries			
Coupons			
Gift cards			
All Others			
Item Fees			
Total Sales Detail	$20.00	$0.00	$20.00

Payment Summary Info

	#	Total	Sales	Layaways
Charge:Store Credi	4.00	$20.00	$20.00	
Charge:Store CreditDi	3.00	$1.25	$1.25	
Cash		-$1.25	-$1.25	
Total Payments		$20.00	$20.00	
Total Cash Payouts		-$10.00		

Sales Summary

Total Taxable Sales	
Total Non-Taxable Sales	$20.00
Total Gross Sales	$20.00
Finished Sales Tax	
Finished Layaways Tax	
Net Layaway Payments	
Total Sales Summary	$20.00

Sales Tax Detail

Tax 1	$2.00
Tax 1	$946.98
GST	$0.84
HST @ 5%	$0.35
Total Tax	$950.17

Related Topics

Selecting the Right Report

VOIDED SALES REPORT

Inventory Module ➔ *Reports* ➔ *Reports* ➔ *End of Day*

This report displays all sales that were voided during the Point of Sale process. This report is the only way to find information about voided sales.

When to Use:

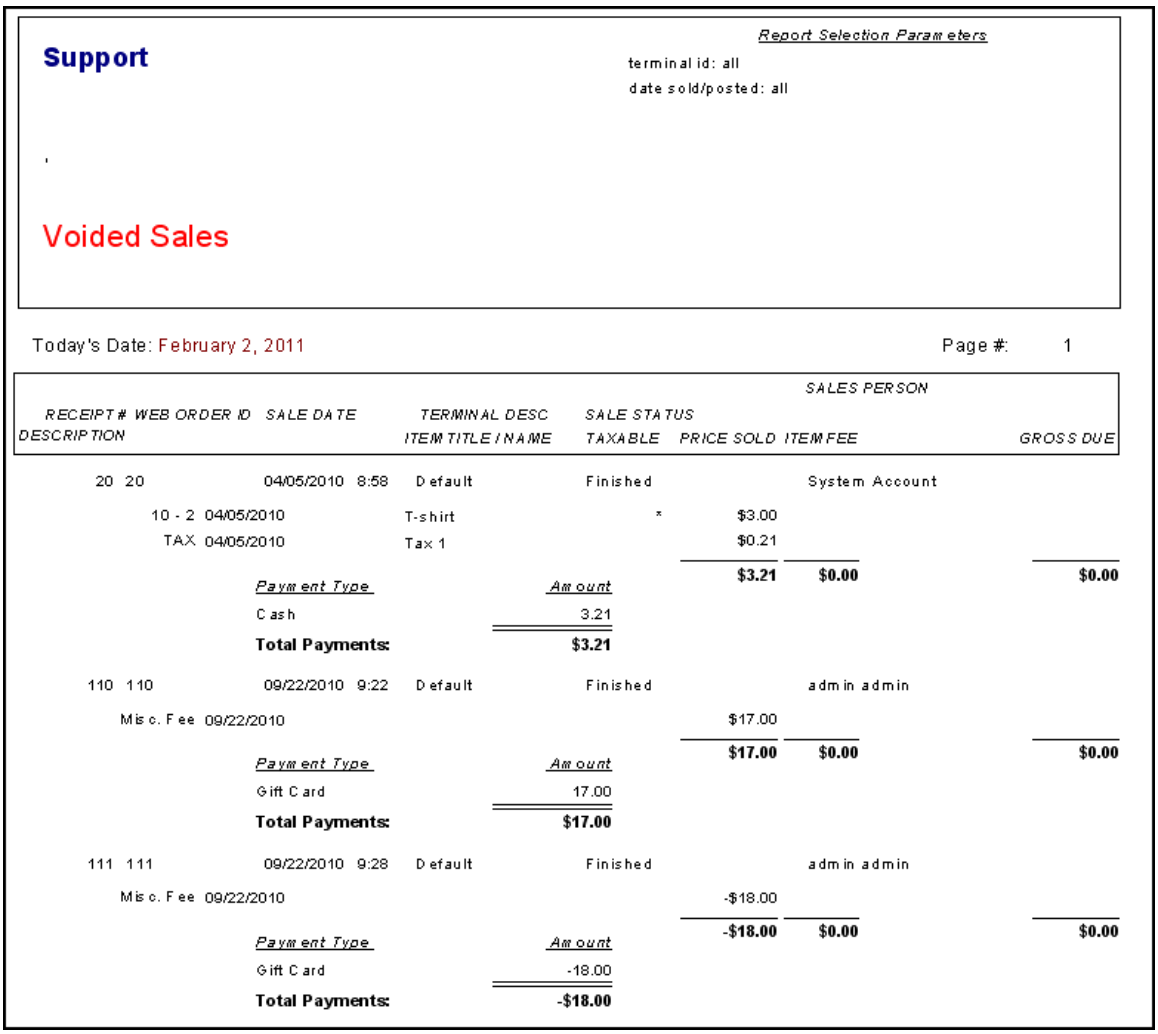
Run this report to find information about sales you know were voided or to track down "missing" sales.

Criteria Choices:

- Terminal ID
- Date Sold/Posted

Sample Report

To view a sample of the Voided Sales Report, click here.



Support

Report Selection Parameters
terminal id: all
date sold/posted: all

Voided Sales

Today's Date: February 2, 2011 Page #: 1

RECEIPT #	WEB ORDER ID	SALE DATE	TERMINAL DESC	SALE STATUS		SALES PERSON		
DESCRIPTION			ITEM TITLE / NAME	TAXABLE	PRICE SOLD	ITEM FEE		GROSS DUE
20	20	04/05/2010 8:58	Default	Finished		System Account		
10 - 2		04/05/2010	T-shirt	*	$3.00			
TAX		04/05/2010	Tax 1		$0.21			
					$3.21	**$0.00**		**$0.00**
		Payment Type		*Amount*				
		Cash		3.21				
		Total Payments:		**$3.21**				
110	110	09/22/2010 9:22	Default	Finished		admin admin		
Misc. Fee		09/22/2010			$17.00			
					$17.00	**$0.00**		**$0.00**
		Payment Type		*Amount*				
		Gift Card		17.00				
		Total Payments:		**$17.00**				
111	111	09/22/2010 9:28	Default	Finished		admin admin		
Misc. Fee		09/22/2010			-$18.00			
					-$18.00	**$0.00**		**$0.00**
		Payment Type		*Amount*				
		Gift Card		-18.00				
		Total Payments:		**-$18.00**				

Related Topics

Selecting the Right Report

ITEM DESCRIPTION WITH SALES EXTENDED REPORT

Inventory Module ➔ *Reports* ➔ *Reports* ➔ *Sales (Inventory)*

Displays a detailed view of every transaction for each item, organized by account. Shows summary information for each item, including Original Quantity, Quantity On-Hand, Extended Price (price on-hand), and Cost of Available goods.

The sales records include the receipt/order number if applicable, and COGS information.

When to Use:

Run the report to find Cost of Goods Sold over a particular time span, or to show the current Cost of Goods On Hand.

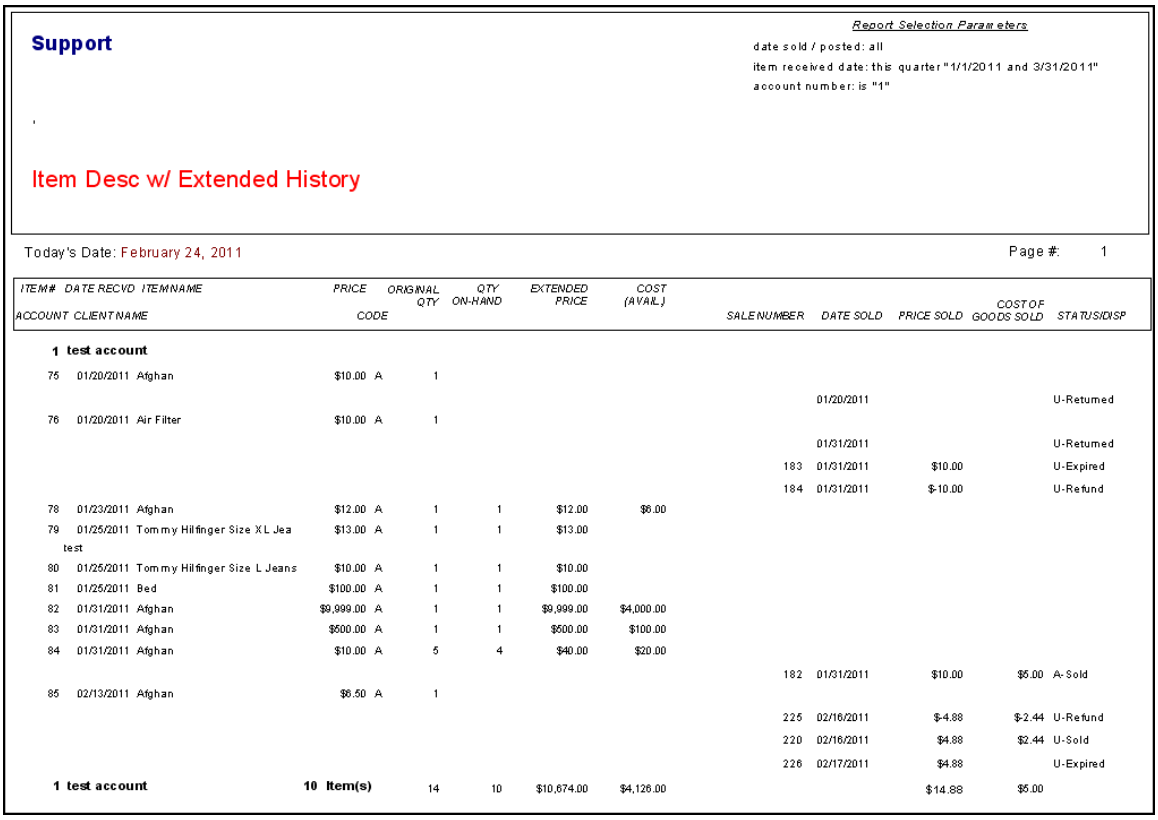
Criteria Choices:

- Account Number
- Item Received Date
- Date Sold/Posted
- Account Type
- Category 1
- Category 2
- Category 3
- Cost/Net
- Filter Code
- Item Disposition
- Item Status
- Location
- Price Code
- Product Line
- Purchase Method
- Selling Price
- Terminal ID
- Active Account?
- Store Section
- Sold at Discount?
- Location

Copyright 2010, Resaleworld.com, Inc.

Sample Report

To view a sample of the Item Description with Extended History Report, click here.



Support

Report Selection Parameters
date sold / posted: all
item received date: this quarter "1/1/2011 and 3/31/2011"
account number: is "1"

Item Desc w/ Extended History

Today's Date: February 24, 2011 Page #: 1

ITEM#	DATE RECVD	ITEMNAME	PRICE CODE	ORIGINAL QTY	QTY ON-HAND	EXTENDED PRICE	COST (AVAIL.)	SALE NUMBER	DATE SOLD	PRICE SOLD	COST OF GOODS SOLD	STATUS/DISP
ACCOUNT	CLIENT NAME											
1	**test account**											
75	01/20/2011	Afghan	$10.00 A	1								
									01/20/2011			U-Returned
76	01/20/2011	Air Filter	$10.00 A	1								
									01/31/2011			U-Returned
								183	01/31/2011	$10.00		U-Expired
								184	01/31/2011	$-10.00		U-Refund
78	01/23/2011	Afghan	$12.00 A	1	1	$12.00	$6.00					
79	01/25/2011	Tommy Hilfinger Size XL Jea test	$13.00 A	1	1	$13.00						
80	01/25/2011	Tommy Hilfinger Size L Jeans	$10.00 A	1	1	$10.00						
81	01/25/2011	Bed	$100.00 A	1	1	$100.00						
82	01/31/2011	Afghan	$9,999.00 A	1	1	$9,999.00	$4,000.00					
83	01/31/2011	Afghan	$500.00 A	1	1	$500.00	$100.00					
84	01/31/2011	Afghan	$10.00 A	5	4	$40.00	$20.00					
								182	01/31/2011	$10.00	$5.00	A-Sold
85	02/13/2011	Afghan	$6.50 A	1								
								225	02/16/2011	$-4.88	$-2.44	U-Refund
								220	02/16/2011	$4.88	$2.44	U-Sold
								226	02/17/2011	$4.88		U-Expired
1	**test account**		**10 Item(s)**	14	10	$10,674.00	$4,126.00			$14.88	$5.00	

Related Topics

Selecting the Right Report

ITEM DESCRIPTION WITH SALES HISTORY REPORT

Inventory Module → Reports → Reports → Sales (Inventory)

Displays all transactions including sales and returns related to each Inventory Item in each account.

When to Use:

This report provides a full transaction history for specific items. The large amount of criteria that can be used in this report make it ideal for finding items that meet a specific set of conditions. This is also one of the few sales-based reports that includes the item description.

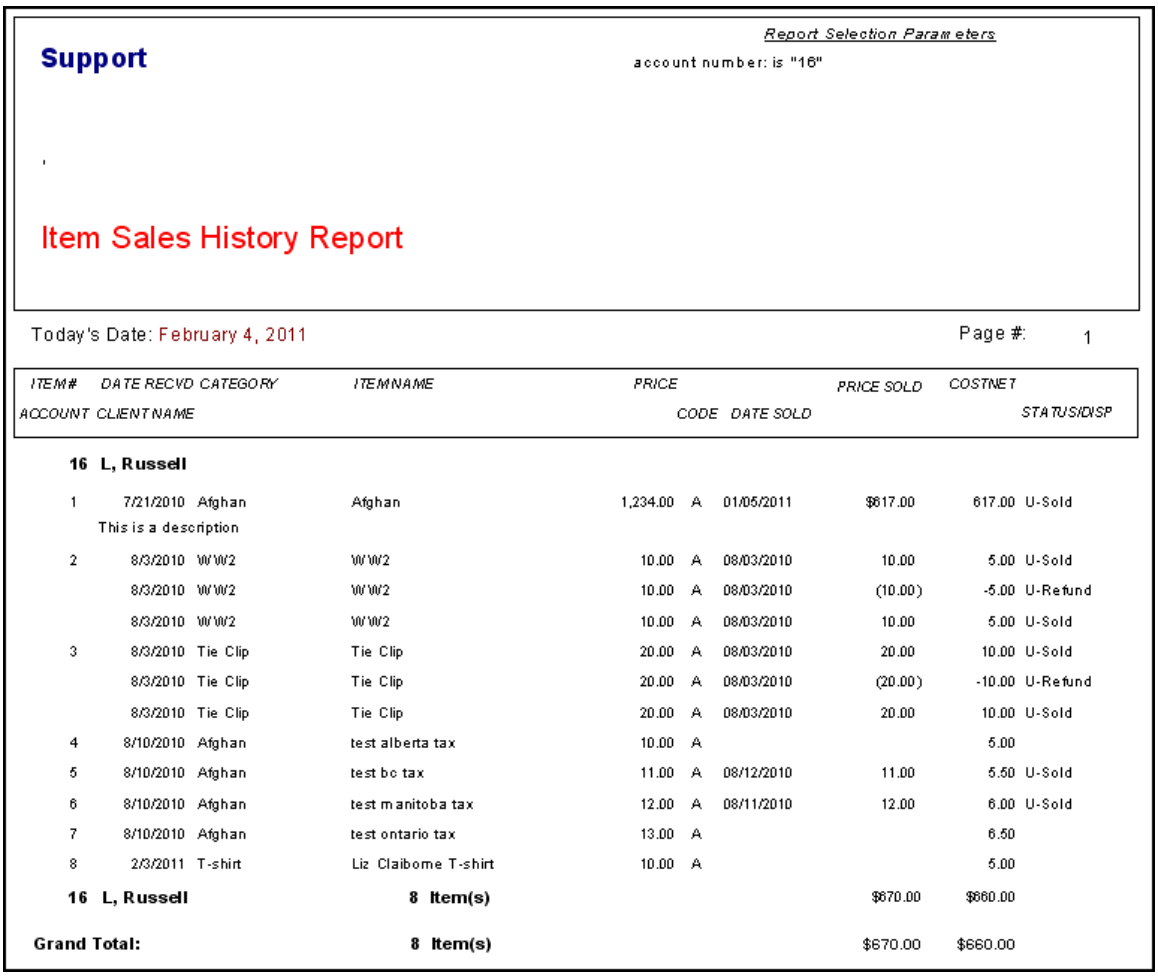
Criteria Choices:

- Account Number
- Item Received Date
- Date Sold/Posted
- Account Type
- Category 1
- Category 2
- Category 3
- Cost/Net
- Filter Code
- Item Disposition
- Item Status
- Location
- Price Code
- Product Line
- Purchase Method
- Selling Price
- Terminal ID
- Active Account?
- Store Section
- Sold at Discount?

Sample Report

To view a sample of the Item Description with Sales History Report, click here.

Copyright 2010, Resaleworld.com, Inc.



Report Selection Parameters

Support

account number: is "16"

Item Sales History Report

Today's Date: February 4, 2011 Page #: 1

ITEM# / ACCOUNT	DATE RECVD / CLIENT NAME	CATEGORY	ITEM NAME	PRICE	CODE	DATE SOLD	PRICE SOLD	COST NET	STATUS/DISP
16	**L, Russell**								
1	7/21/2010	Afghan	Afghan	1,234.00	A	01/05/2011	$617.00	617.00	U-Sold
	This is a description								
2	8/3/2010	WW2	WW2	10.00	A	08/03/2010	10.00	5.00	U-Sold
	8/3/2010	WW2	WW2	10.00	A	08/03/2010	(10.00)	-5.00	U-Refund
	8/3/2010	WW2	WW2	10.00	A	08/03/2010	10.00	5.00	U-Sold
3	8/3/2010	Tie Clip	Tie Clip	20.00	A	08/03/2010	20.00	10.00	U-Sold
	8/3/2010	Tie Clip	Tie Clip	20.00	A	08/03/2010	(20.00)	-10.00	U-Refund
	8/3/2010	Tie Clip	Tie Clip	20.00	A	08/03/2010	20.00	10.00	U-Sold
4	8/10/2010	Afghan	test alberta tax	10.00	A			5.00	
5	8/10/2010	Afghan	test bc tax	11.00	A	08/12/2010	11.00	5.50	U-Sold
6	8/10/2010	Afghan	test manitoba tax	12.00	A	08/11/2010	12.00	6.00	U-Sold
7	8/10/2010	Afghan	test ontario tax	13.00	A			6.50	
8	2/3/2011	T-shirt	Liz Claiborne T-shirt	10.00	A			5.00	
16	**L, Russell**		**8 Item(s)**				$670.00	$660.00	
Grand Total:			**8 Item(s)**				$670.00	$660.00	

Related Topics

Selecting the Right Report

ITEM SALES WITH USER FIELDS REPORT

Inventory Module → Reports → Reports → Sales (Inventory)

This report shows any values entered into the custom fields for inventory, in addition to basic information about the item. The report includes a subtotal and grand total for each of the custom fields. If the value entered is a valid number, it will be included in the totals. However, if the value is text or a date, it will be ignored.

When to Use:

Use this report to see a listing of values entered into the Custom Fields for Items. This is the only report to display these values.

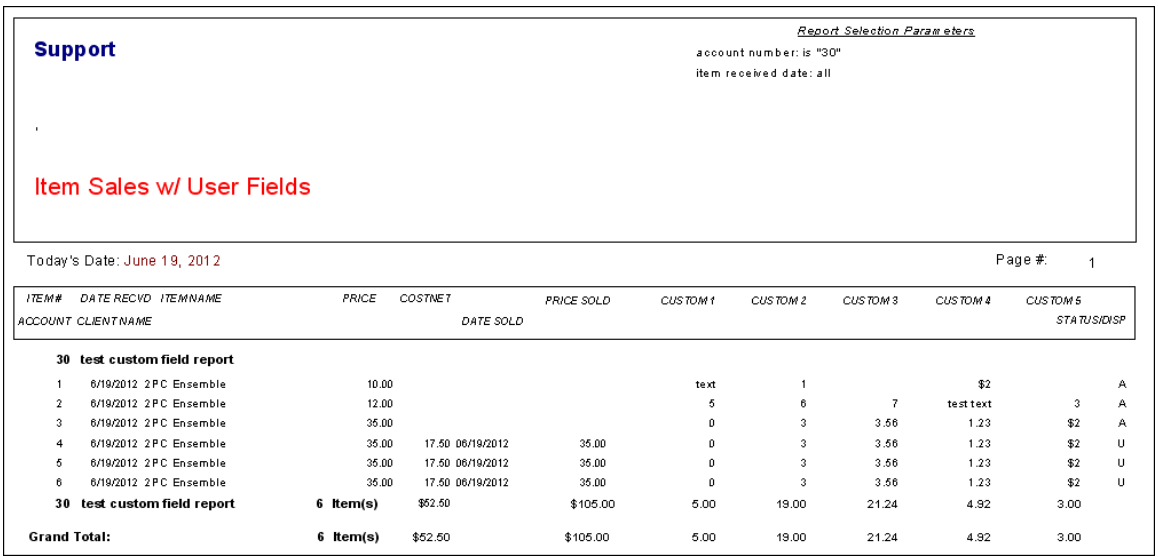
Criteria Choices:

- Account Number
- Account Type
- Active Account?
- Category 1
- Category 2
- Category 3
- Cost/Net
- Date Sold/Posted
- Item Received Date
- Filter Code
- Item Disposition
- Item Status
- Location
- Price Code
- Product Line
- Purchase Method
- Selling Price
- Sold at Discount?
- Store Section
- Terminal ID

Sample Report

To view a sample of the Item Sales with User Fields Report, click here.

Copyright 2010, Resaleworld.com, Inc.



Support

Report Selection Parameters
account number: is "30"
item received date: all

Item Sales w/ User Fields

Today's Date: June 19, 2012 Page #: 1

ITEM#	DATE RECVD	ITEMNAME	PRICE	COSTNET	PRICE SOLD	CUSTOM 1	CUSTOM 2	CUSTOM 3	CUSTOM 4	CUSTOM 5	
ACCOUNT	CLIENTNAME			DATE SOLD						STATUS/DISP	
30	**test custom field report**										
1	6/19/2012	2PC Ensemble	10.00			text	1		$2		A
2	6/19/2012	2PC Ensemble	12.00			5	6	7	test text	3	A
3	6/19/2012	2PC Ensemble	35.00			0	3	3.56	1.23	$2	A
4	6/19/2012	2PC Ensemble	35.00	17.50	06/19/2012	35.00	0	3	3.56	1.23	$2 U
5	6/19/2012	2PC Ensemble	35.00	17.50	06/19/2012	35.00	0	3	3.56	1.23	$2 U
6	6/19/2012	2PC Ensemble	35.00	17.50	06/19/2012	35.00	0	3	3.56	1.23	$2 U
30	**test custom field report**	**6 Item(s)**	$52.50			$105.00	5.00	19.00	21.24	4.92	3.00
Grand Total:		**6 Item(s)**	$52.50			$105.00	5.00	19.00	21.24	4.92	3.00

Related Topics

Selecting the Right Report

PROFIT BY BRAND REPORT

Inventory Module → Reports → Reports → Sales (Inventory)

Displays gross profit totals for each brand along with average days and number of items sold. Choosing to not suppress detail information will show individual sales records.

When to Use:

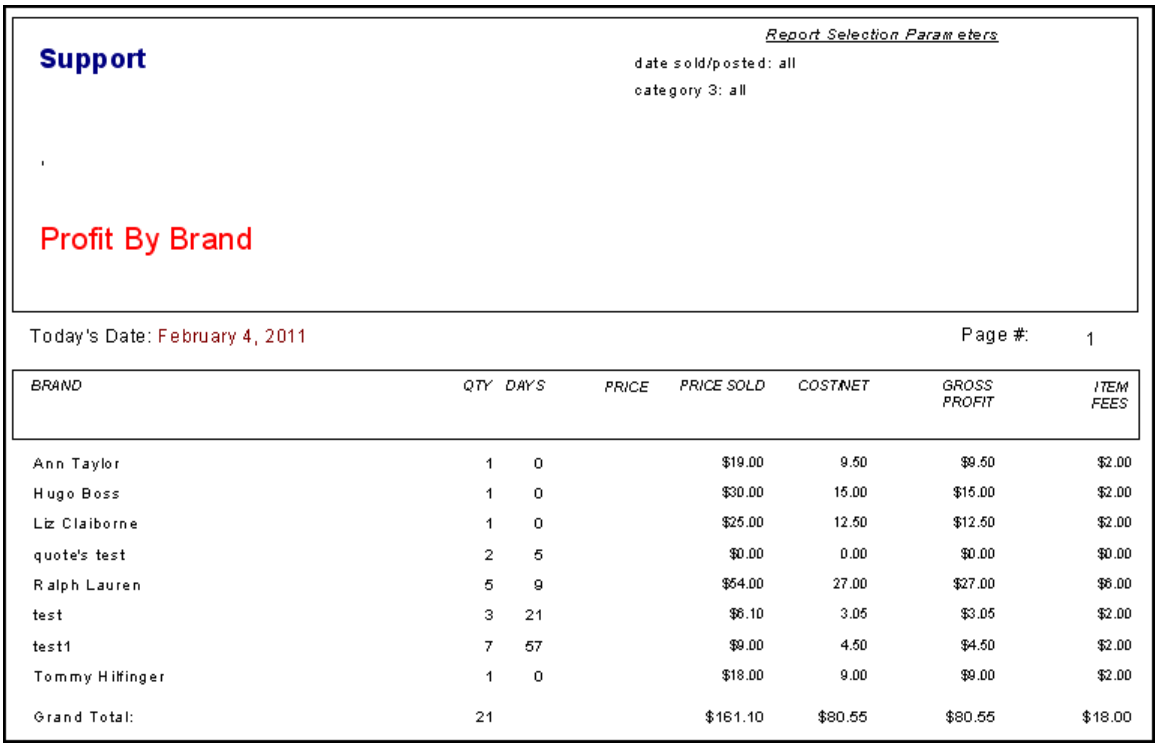
Run this report to compare how profitable different brands are and to see how quickly certain brands are selling.

Criteria Choices:

- Brand
- Date Sold/Posted
- Category 1
- Category 2
- Category 3
- Account Number
- Filter Code
- Product Line
- Item Received Date

Sample Report

To view a sample of the Profit by Brand Report, click here.



Support

Report Selection Parameters

date sold/posted: all

category 3: all

'

Profit By Brand

Today's Date: February 4, 2011 Page #: 1

BRAND	QTY	DAYS	PRICE	PRICE SOLD	COST/NET	GROSS PROFIT	ITEM FEES
Ann Taylor	1	0		$19.00	9.50	$9.50	$2.00
Hugo Boss	1	0		$30.00	15.00	$15.00	$2.00
Liz Claiborne	1	0		$25.00	12.50	$12.50	$2.00
quote's test	2	5		$0.00	0.00	$0.00	$0.00
Ralph Lauren	5	9		$54.00	27.00	$27.00	$6.00
test	3	21		$6.10	3.05	$3.05	$2.00
test1	7	57		$9.00	4.50	$4.50	$2.00
Tommy Hilfinger	1	0		$18.00	9.00	$9.00	$2.00
Grand Total:	21			$161.10	$80.55	$80.55	$18.00

Related Topics

Selecting the Right Report

PROFIT BY CATEGORY REPORT

Inventory Module ➔ *Reports* ➔ *Reports* ➔ *Sales (Inventory)*

Displays gross profit totals by each category level along with average days and number of items sold for each category. Choosing to not suppress detail information will show individual sales records.

When to Use:

Run this report to compare how profitable different categories are and to see how quickly certain types of goods are selling.

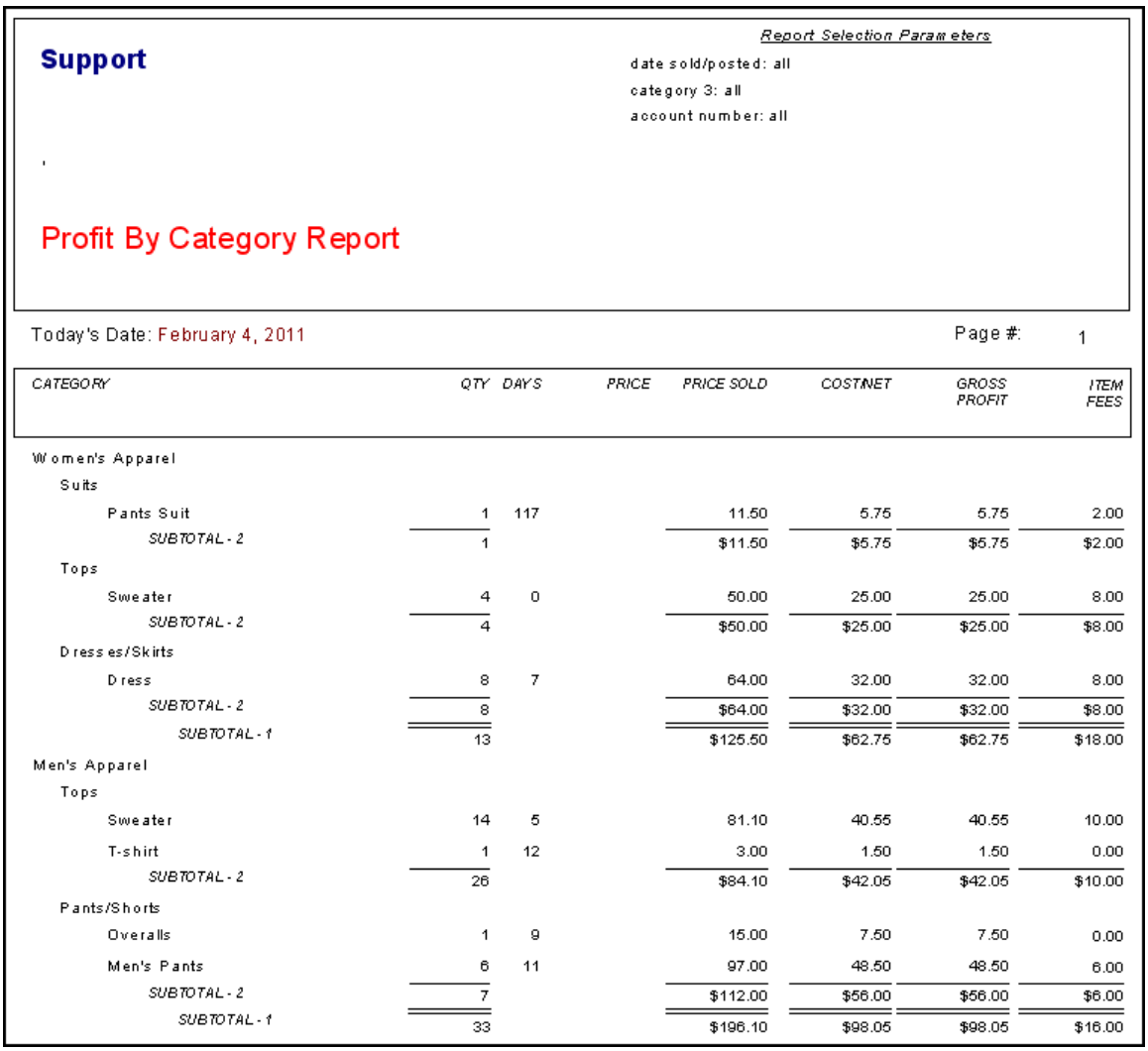
Criteria Choices:

- Date Sold/Posted
- Category 1
- Category 2
- Category 3
- Account Number
- Product Line

Sample Report

To view a sample of the Profit by Category Report, click here.

Copyright 2010, Resaleworld.com, Inc.



Support

Report Selection Parameters
date sold/posted: all
category 3: all
account number: all

Profit By Category Report

Today's Date: February 4, 2011 Page #: 1

CATEGORY	QTY	DAYS	PRICE	PRICE SOLD	COST/NET	GROSS PROFIT	ITEM FEES
Women's Apparel							
Suits							
Pants Suit	1	117		11.50	5.75	5.75	2.00
SUBTOTAL - 2	1			$11.50	$5.75	$5.75	$2.00
Tops							
Sweater	4	0		50.00	25.00	25.00	8.00
SUBTOTAL - 2	4			$50.00	$25.00	$25.00	$8.00
Dresses/Skirts							
Dress	8	7		64.00	32.00	32.00	8.00
SUBTOTAL - 2	8			$64.00	$32.00	$32.00	$8.00
SUBTOTAL - 1	13			$125.50	$62.75	$62.75	$18.00
Men's Apparel							
Tops							
Sweater	14	5		81.10	40.55	40.55	10.00
T-shirt	1	12		3.00	1.50	1.50	0.00
SUBTOTAL - 2	26			$84.10	$42.05	$42.05	$10.00
Pants/Shorts							
Overalls	1	9		15.00	7.50	7.50	0.00
Men's Pants	6	11		97.00	48.50	48.50	6.00
SUBTOTAL - 2	7			$112.00	$56.00	$56.00	$6.00
SUBTOTAL - 1	33			$196.10	$98.05	$98.05	$16.00

Related Topics

Selecting the Right Report

PROFIT BY SECTION REPORT

Inventory Module → Reports → Reports → Sales (Inventory)

This report groups all sales information by Store Section.

When to Use:

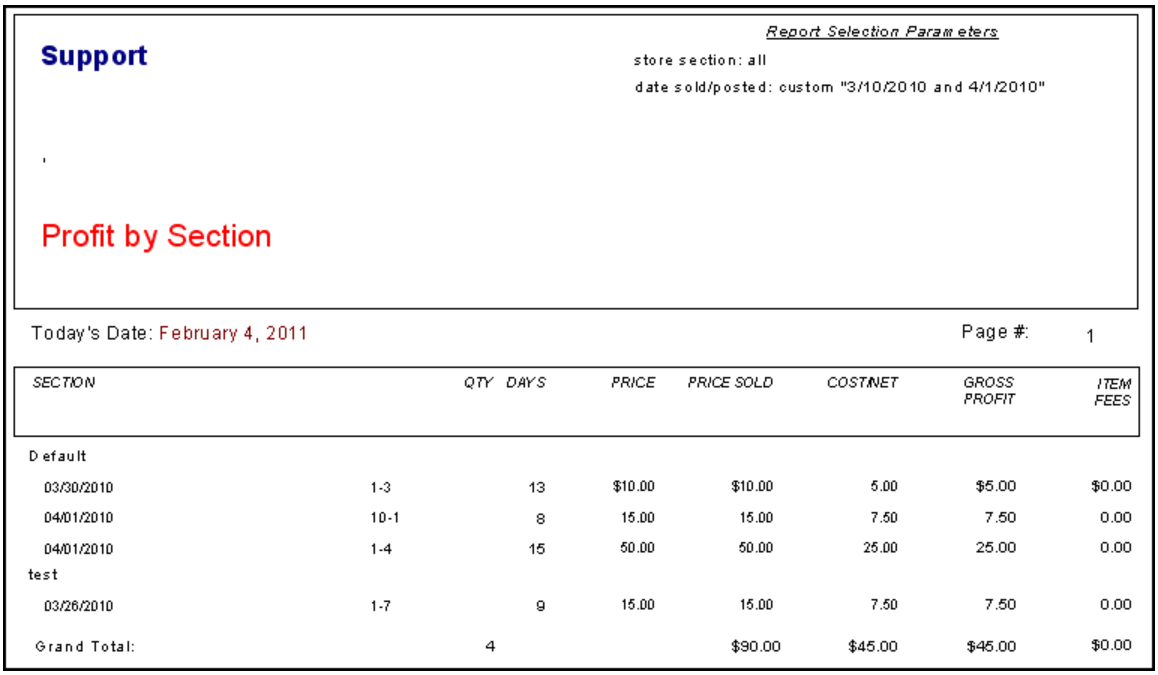
This is the only report that groups sales information by Store Section.

Criteria Choices:

- Store Section
- Date Sold/Posted

Sample Report

To view a sample of the Profit by Section Report, click here.



Support

Report Selection Parameters
store section: all
date sold/posted: custom "3/10/2010 and 4/1/2010"

Profit by Section

Today's Date: February 4, 2011 Page #: 1

SECTION		QTY	DAYS	PRICE	PRICE SOLD	COST/NET	GROSS PROFIT	ITEM FEES
Default								
03/30/2010	1-3		13	$10.00	$10.00	5.00	$5.00	$0.00
04/01/2010	10-1		8	15.00	15.00	7.50	7.50	0.00
04/01/2010	1-4		15	50.00	50.00	25.00	25.00	0.00
test								
03/26/2010	1-7		9	15.00	15.00	7.50	7.50	0.00
Grand Total:		4			$90.00	$45.00	$45.00	$0.00

Related Topics

Selecting the Right Report

Copyright 2010, Resaleworld.com, Inc.

PURCHASES BY CUSTOMER REPORT

Inventory Module ➔ *Reports* ➔ *Reports* ➔ *Sales (Inventory)*

Displays purchases for each customer. Includes the number of purchases, average purchase amount, and average item amount.

When to Use:

This report is the best way to identify your best customers.

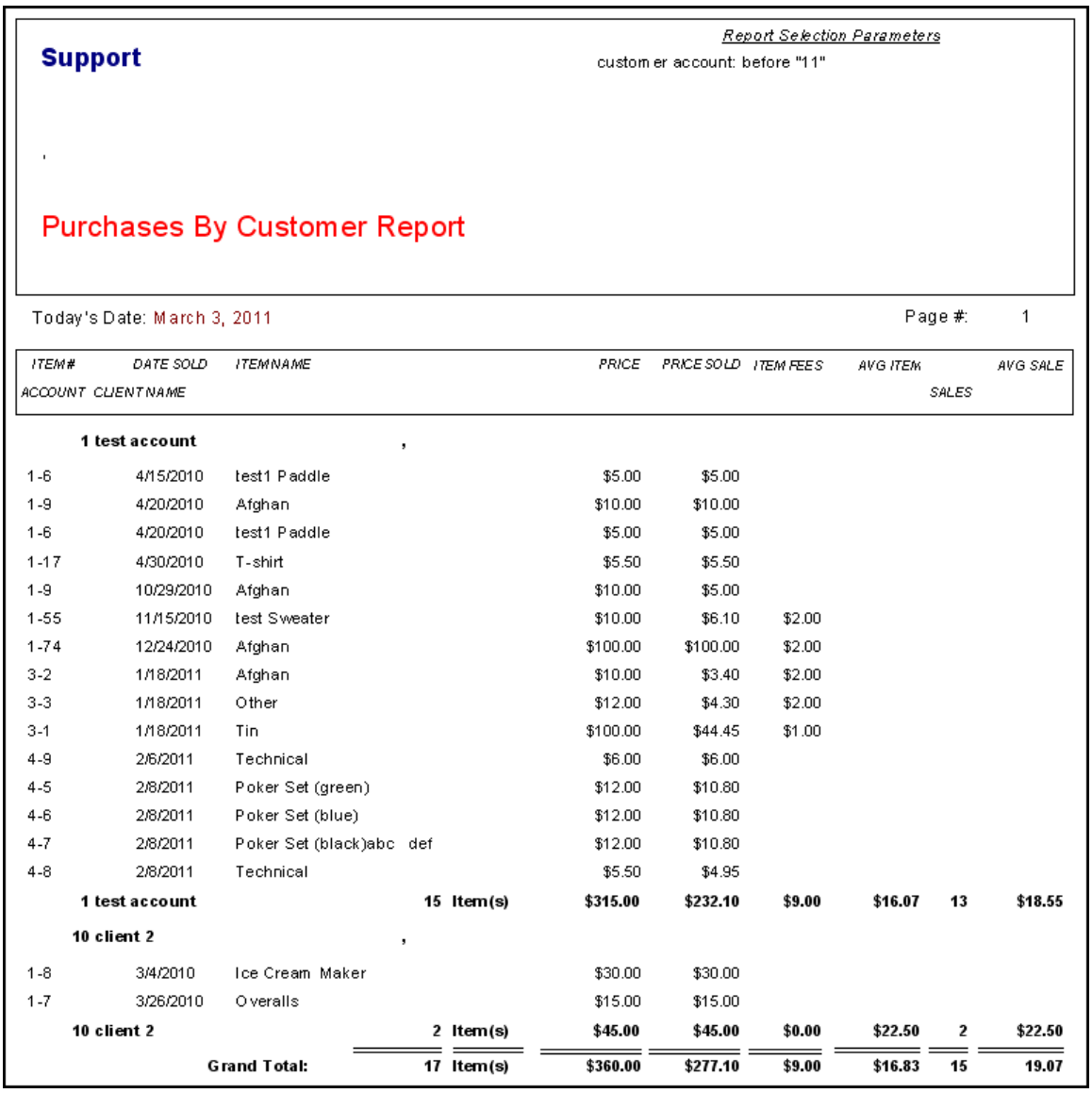
Criteria Choices:

- Customer Account
- Date Sold/Posted
- Filter Code
- Last Purchase Date
- Return
- Tax Exempt Customers?
- Total Purchases
- Zip Code
- Category 1
- Category 2
- Category 3
- Price Code
- Brand
- Size
- Color

Sample Report

To view a sample of the Purchases by Customer Report, click here.

Copyright 2010, Resaleworld.com, Inc.



Support

Report Selection Parameters
customer account: before "11"

Purchases By Customer Report

Today's Date: March 3, 2011 Page #: 1

ITEM#	DATE SOLD	ITEM NAME			PRICE	PRICE SOLD	ITEM FEES	AVG ITEM		AVG SALE
ACCOUNT	CLIENT NAME								SALES	
1 test account		,								
1-6	4/15/2010	test1 Paddle			$5.00	$5.00				
1-9	4/20/2010	Afghan			$10.00	$10.00				
1-6	4/20/2010	test1 Paddle			$5.00	$5.00				
1-17	4/30/2010	T-shirt			$5.50	$5.50				
1-9	10/29/2010	Afghan			$10.00	$5.00				
1-55	11/15/2010	test Sweater			$10.00	$6.10	$2.00			
1-74	12/24/2010	Afghan			$100.00	$100.00	$2.00			
3-2	1/18/2011	Afghan			$10.00	$3.40	$2.00			
3-3	1/18/2011	Other			$12.00	$4.30	$2.00			
3-1	1/18/2011	Tin			$100.00	$44.45	$1.00			
4-9	2/6/2011	Technical			$6.00	$6.00				
4-5	2/8/2011	Poker Set (green)			$12.00	$10.80				
4-6	2/8/2011	Poker Set (blue)			$12.00	$10.80				
4-7	2/8/2011	Poker Set (black)abc def			$12.00	$10.80				
4-8	2/8/2011	Technical			$5.50	$4.95				
1 test account			**15**	**Item(s)**	**$315.00**	**$232.10**	**$9.00**	**$16.07**	**13**	**$18.55**
10 client 2		,								
1-8	3/4/2010	Ice Cream Maker			$30.00	$30.00				
1-7	3/26/2010	Overalls			$15.00	$15.00				
10 client 2			**2**	**Item(s)**	**$45.00**	**$45.00**	**$0.00**	**$22.50**	**2**	**$22.50**
	Grand Total:		**17**	**Item(s)**	**$360.00**	**$277.10**	**$9.00**	**$16.83**	**15**	**19.07**

Related Topics

Selecting the Right Report

PURCHASES BY ZIP/POSTAL CODE REPORT

Inventory Module ➔ *Reports* ➔ *Reports* ➔ *Sales (Inventory)*

This report summarizes all customer purchases by Postal/Zip Code.

> *Note: The Zip Code criteria uses zip codes that are listed under* ***Tools*** ➔ ***Maintain*** ➔ ***Zip Codes*** *in the Inventory Module.*

When to Use:

Identifying where your customers are located is useful for marketing purposes. This is also useful if you have a reCommerce account and sell goods over the internet.

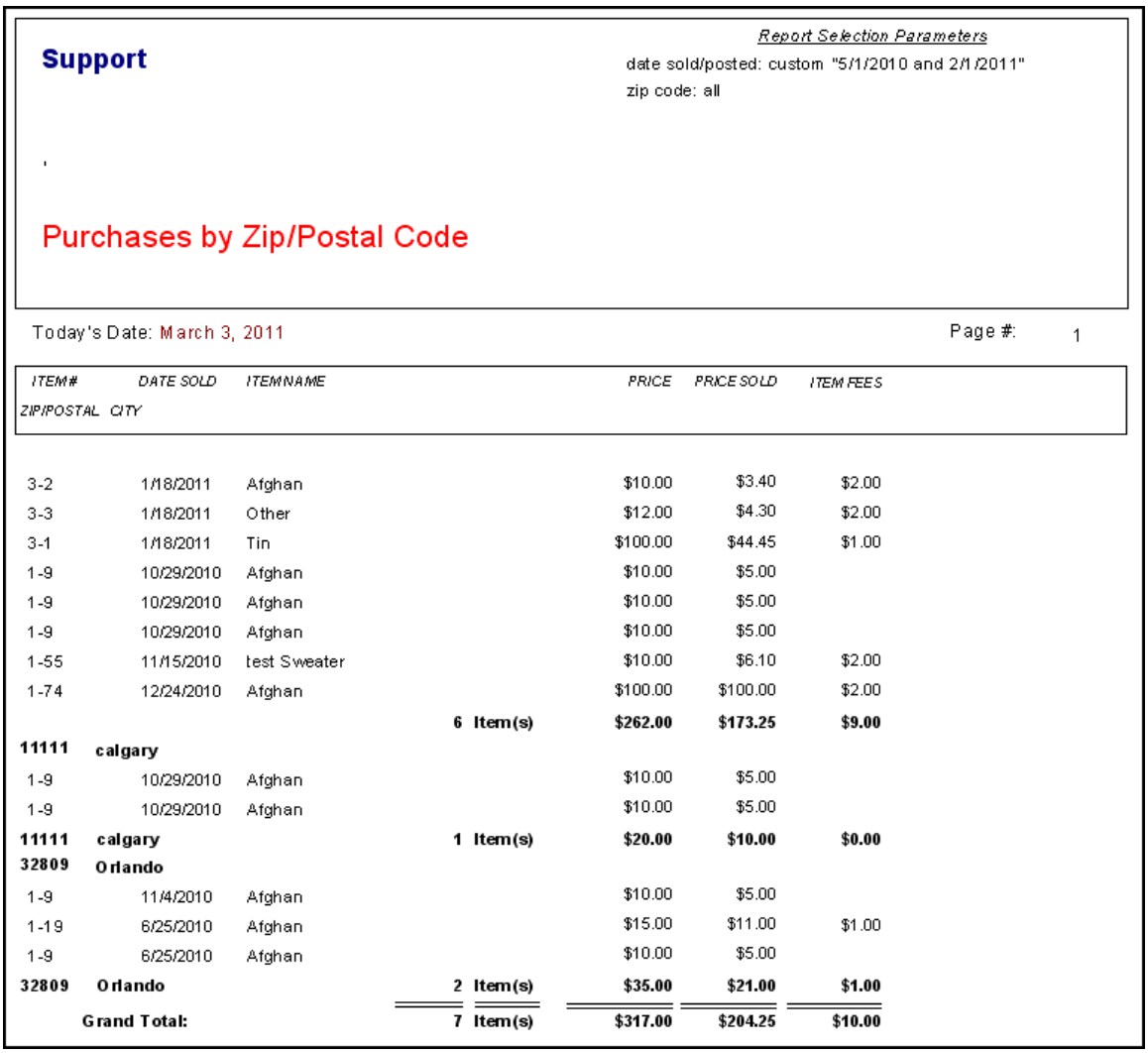
Criteria Choices:

- Zip Code
- Customer Account
- Date Sold/Posted

Sample Report

To view a sample of the Purchases by Zip/Postal Code Report, click here.

Copyright 2010, Resaleworld.com, Inc.



Support

Report Selection Parameters
date sold/posted: custom "5/1/2010 and 2/1/2011"
zip code: all

'

Purchases by Zip/Postal Code

Today's Date: March 3, 2011 Page #: 1

ITEM#	DATE SOLD	ITEM NAME		PRICE	PRICE SOLD	ITEM FEES
ZIP/POSTAL	CITY					
3-2	1/18/2011	Afghan		$10.00	$3.40	$2.00
3-3	1/18/2011	Other		$12.00	$4.30	$2.00
3-1	1/18/2011	Tin		$100.00	$44.45	$1.00
1-9	10/29/2010	Afghan		$10.00	$5.00	
1-9	10/29/2010	Afghan		$10.00	$5.00	
1-9	10/29/2010	Afghan		$10.00	$5.00	
1-55	11/15/2010	test Sweater		$10.00	$6.10	$2.00
1-74	12/24/2010	Afghan		$100.00	$100.00	$2.00
			6 Item(s)	**$262.00**	**$173.25**	**$9.00**
11111	**calgary**					
1-9	10/29/2010	Afghan		$10.00	$5.00	
1-9	10/29/2010	Afghan		$10.00	$5.00	
11111	**calgary**		**1 Item(s)**	**$20.00**	**$10.00**	**$0.00**
32809	**Orlando**					
1-9	11/4/2010	Afghan		$10.00	$5.00	
1-19	6/25/2010	Afghan		$15.00	$11.00	$1.00
1-9	6/25/2010	Afghan		$10.00	$5.00	
32809	**Orlando**		**2 Item(s)**	**$35.00**	**$21.00**	**$1.00**
	Grand Total:		**7 Item(s)**	**$317.00**	**$204.25**	**$10.00**

Related Topics

Selecting the Right Report

SALES BY ACCOUNT REPORT

Inventory Module → Reports → Reports → Sales (Inventory)

Displays finished inventory sales records, organized by account/item.

When to Use:

This report provides a quick overview of sales activity for each account. The report only includes the Selling Price, Item Fees, and Shipping Fees for each record.

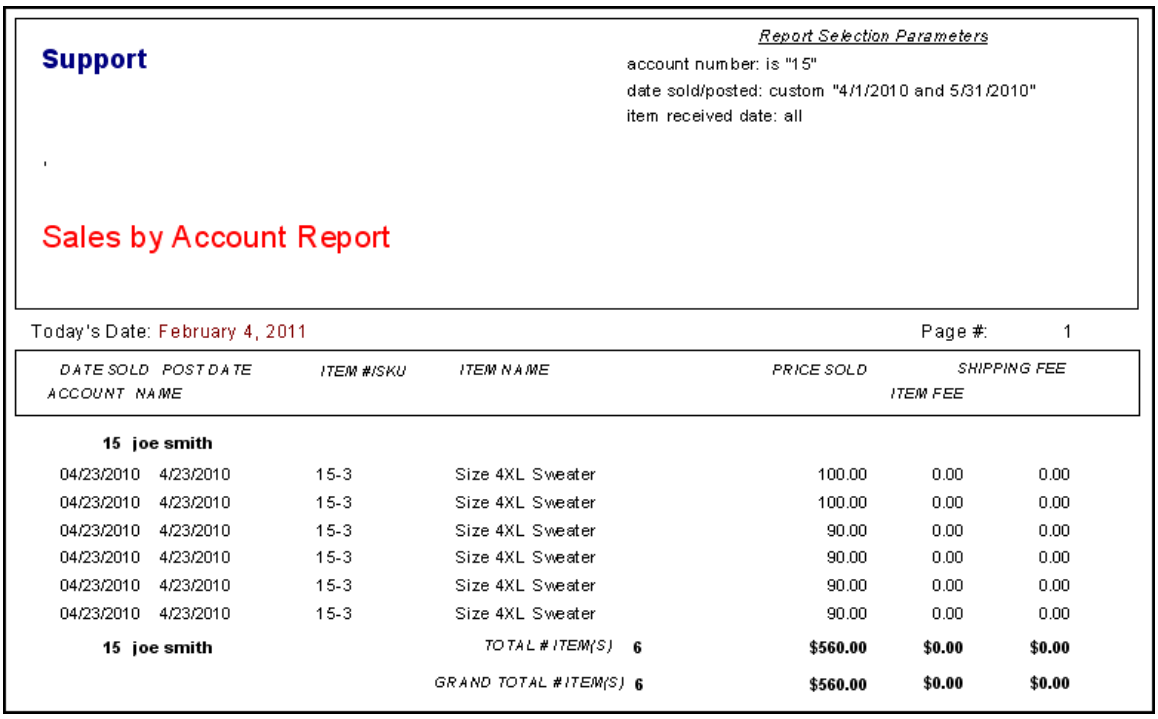
Criteria Choices:

- Criteria Choices:
- Account Number
- Date Sold/Posted
- Item Received Date
- Category 1
- Category 2
- Category 3
- Price Code
- Product Line
- Sales Status
- Selling Price
- Sold at Discount?
- Terminal ID
- Active Account?

Sample Report

To view a sample of the Sales by Account Report, click here.

Copyright 2010, Resaleworld.com, Inc.



Support

Report Selection Parameters
account number: is "15"
date sold/posted: custom "4/1/2010 and 5/31/2010"
item received date: all

Sales by Account Report

Today's Date: February 4, 2011 Page #: 1

DATE SOLD / POST DATE / ACCOUNT / NAME	ITEM #/SKU	ITEM NAME	PRICE SOLD	SHIPPING FEE / ITEM FEE	
15 joe smith					
04/23/2010 4/23/2010	15-3	Size 4XL Sweater	100.00	0.00	0.00
04/23/2010 4/23/2010	15-3	Size 4XL Sweater	100.00	0.00	0.00
04/23/2010 4/23/2010	15-3	Size 4XL Sweater	90.00	0.00	0.00
04/23/2010 4/23/2010	15-3	Size 4XL Sweater	90.00	0.00	0.00
04/23/2010 4/23/2010	15-3	Size 4XL Sweater	90.00	0.00	0.00
04/23/2010 4/23/2010	15-3	Size 4XL Sweater	90.00	0.00	0.00
15 joe smith		*TOTAL # ITEM(S)* **6**	**$560.00**	**$0.00**	**$0.00**
		GRAND TOTAL # ITEM(S) **6**	**$560.00**	**$0.00**	**$0.00**

Related Topics

Selecting the Right Report

SALES BY CATEGORY REPORT

Inventory Module → Reports → Reports → Sales (Inventory)

Displays sales and summary information sorted and grouped by category.

When to Use:

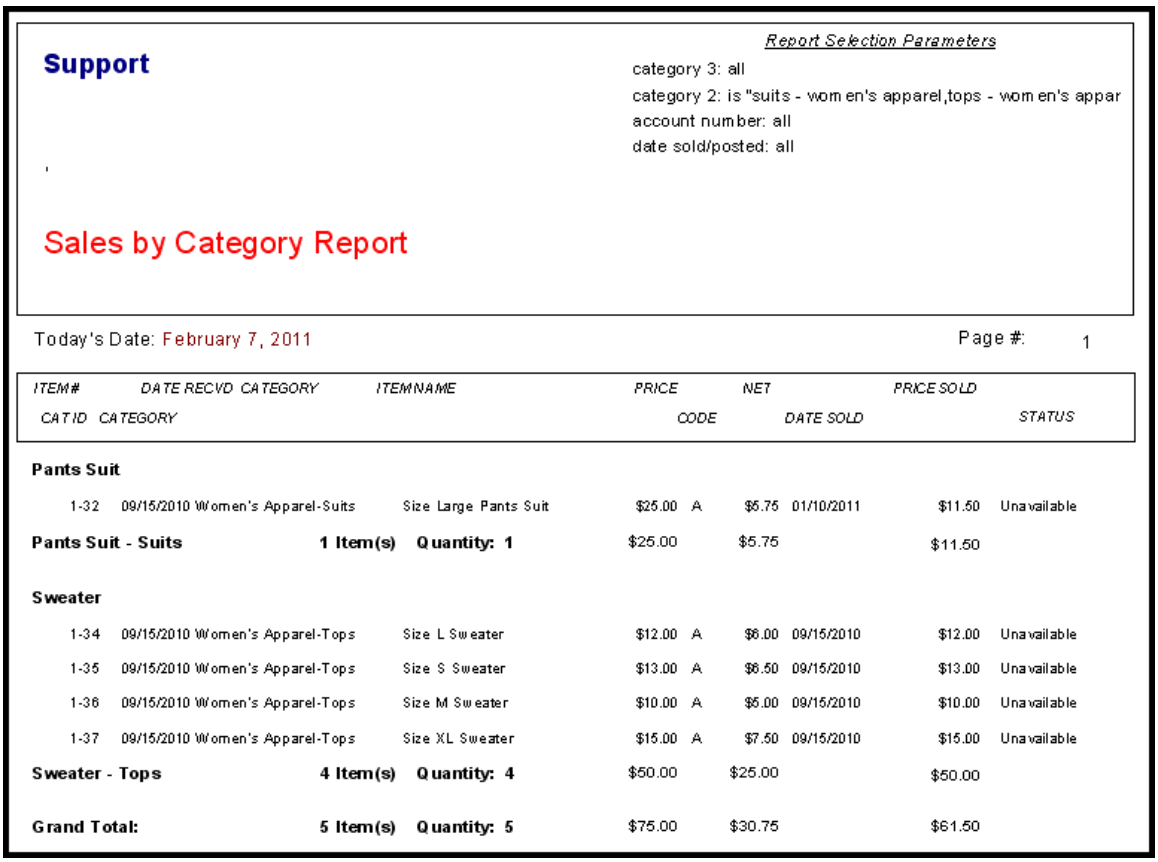
This report is probably most useful to stores using a one-level category structure. This report includes Price, Price Sold, and Net for each item.

Criteria Choices:

- Category 1
- Category 2
- Category 3
- Account Number
- Date Sold/Posted
- Brand
- Color
- Size
- Selling Price
- Price Code
- Item Status
- Item Received Date
- Filter Code
- Sold at Discount?

Sample Report

To view a sample of the Sales by Category Report, click here.



Support

Report Selection Parameters
category 3: all
category 2: is "suits - women's apparel,tops - women's appar
account number: all
date sold/posted: all

Sales by Category Report

Today's Date: February 7, 2011 Page #: 1

ITEM#	DATE RECVD	CATEGORY	ITEMNAME	PRICE	CODE	NET	DATE SOLD	PRICE SOLD	STATUS
CATID	CATEGORY								
Pants Suit									
1-32	09/15/2010	Women's Apparel-Suits	Size Large Pants Suit	$25.00	A	$5.75	01/10/2011	$11.50	Unavailable
Pants Suit - Suits		**1 Item(s)**	**Quantity: 1**	$25.00		$5.75		$11.50	
Sweater									
1-34	09/15/2010	Women's Apparel-Tops	Size L Sweater	$12.00	A	$6.00	09/15/2010	$12.00	Unavailable
1-35	09/15/2010	Women's Apparel-Tops	Size S Sweater	$13.00	A	$6.50	09/15/2010	$13.00	Unavailable
1-36	09/15/2010	Women's Apparel-Tops	Size M Sweater	$10.00	A	$5.00	09/15/2010	$10.00	Unavailable
1-37	09/15/2010	Women's Apparel-Tops	Size XL Sweater	$15.00	A	$7.50	09/15/2010	$15.00	Unavailable
Sweater - Tops		**4 Item(s)**	**Quantity: 4**	$50.00		$25.00		$50.00	
Grand Total:		**5 Item(s)**	**Quantity: 5**	$75.00		$30.75		$61.50	

Related Topics

Selecting the Right Report

SALES BY PRODUCT LINE REPORT

Inventory Module ➔ *Reports* ➔ *Reports* ➔ *Sales (Inventory)*

Displays sales detail for all sold items by Product Line. This report is sorted first by Product Line and then by individual category.

When to Use:

This report can provide a broad overview of different types of products (for example, clothing vs. furniture). Running the Sales by Product Line Report is much easier than selecting each category to include on a Sales by Category Report.

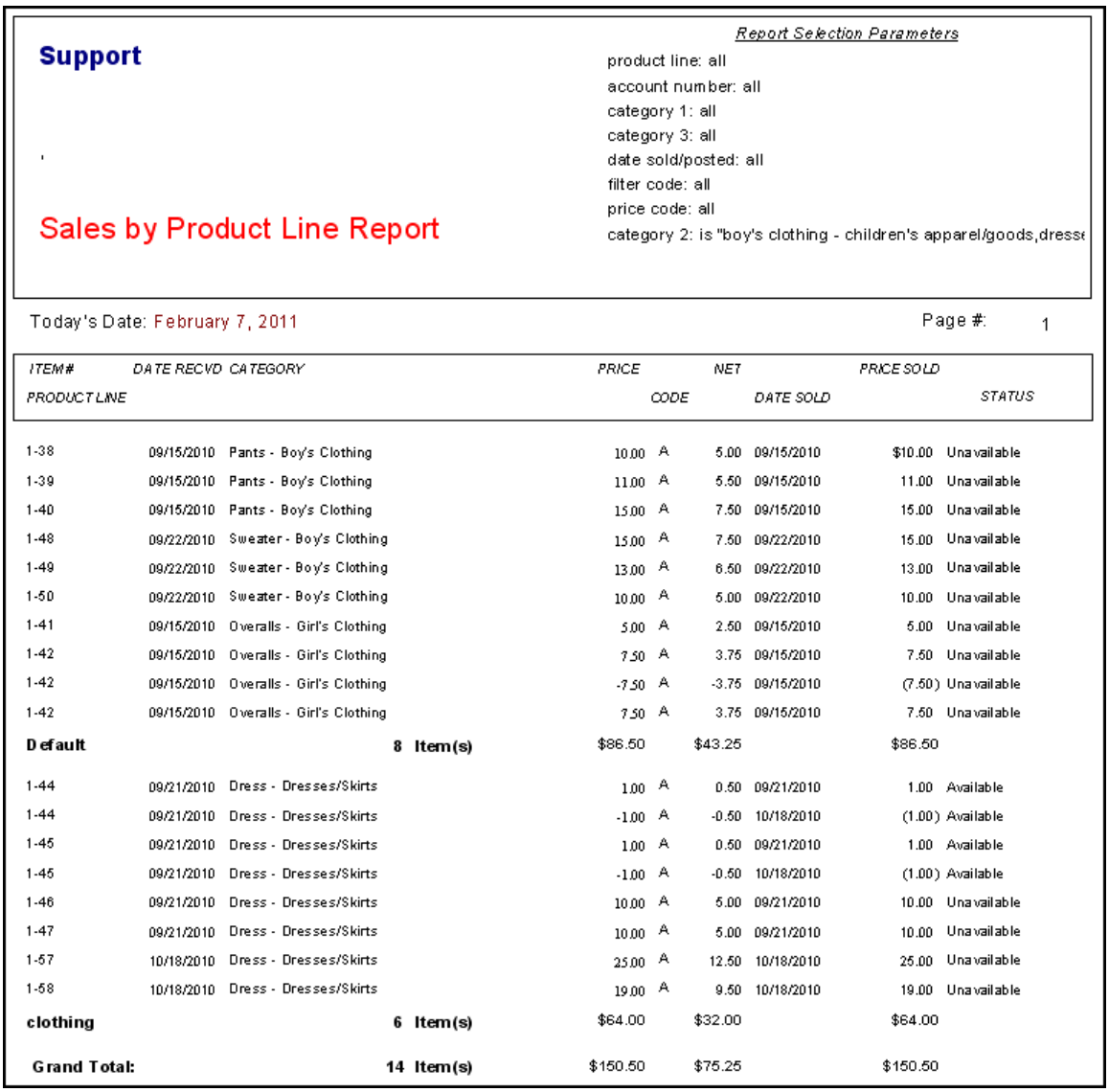
Criteria Choices:

- Product Line
- Category 1
- Category 2
- Category 3
- Account Number
- Date Sold/Posted
- Filter Code
- Price Code
- Sold at Discount?

Sample Report

To view a sample of the Sales by Product Line Report, click here.

Copyright 2010, Resaleworld.com, Inc.



Support

Report Selection Parameters
product line: all
account number: all
category 1: all
category 3: all
date sold/posted: all
filter code: all
price code: all
category 2: is "boy's clothing - children's apparel/goods,dresse

Sales by Product Line Report

Today's Date: February 7, 2011 Page #: 1

ITEM#	DATE RECVD	CATEGORY	PRICE	CODE	NET	DATE SOLD	PRICE SOLD	STATUS
PRODUCT LINE								
1-38	09/15/2010	Pants - Boy's Clothing	10.00	A	5.00	09/15/2010	$10.00	Unavailable
1-39	09/15/2010	Pants - Boy's Clothing	11.00	A	5.50	09/15/2010	11.00	Unavailable
1-40	09/15/2010	Pants - Boy's Clothing	15.00	A	7.50	09/15/2010	15.00	Unavailable
1-48	09/22/2010	Sweater - Boy's Clothing	15.00	A	7.50	09/22/2010	15.00	Unavailable
1-49	09/22/2010	Sweater - Boy's Clothing	13.00	A	6.50	09/22/2010	13.00	Unavailable
1-50	09/22/2010	Sweater - Boy's Clothing	10.00	A	5.00	09/22/2010	10.00	Unavailable
1-41	09/15/2010	Overalls - Girl's Clothing	5.00	A	2.50	09/15/2010	5.00	Unavailable
1-42	09/15/2010	Overalls - Girl's Clothing	7.50	A	3.75	09/15/2010	7.50	Unavailable
1-42	09/15/2010	Overalls - Girl's Clothing	-7.50	A	-3.75	09/15/2010	(7.50)	Unavailable
1-42	09/15/2010	Overalls - Girl's Clothing	7.50	A	3.75	09/15/2010	7.50	Unavailable
Default		**8 Item(s)**	$86.50		$43.25		$86.50	
1-44	09/21/2010	Dress - Dresses/Skirts	1.00	A	0.50	09/21/2010	1.00	Available
1-44	09/21/2010	Dress - Dresses/Skirts	-1.00	A	-0.50	10/18/2010	(1.00)	Available
1-45	09/21/2010	Dress - Dresses/Skirts	1.00	A	0.50	09/21/2010	1.00	Available
1-45	09/21/2010	Dress - Dresses/Skirts	-1.00	A	-0.50	10/18/2010	(1.00)	Available
1-46	09/21/2010	Dress - Dresses/Skirts	10.00	A	5.00	09/21/2010	10.00	Unavailable
1-47	09/21/2010	Dress - Dresses/Skirts	10.00	A	5.00	09/21/2010	10.00	Unavailable
1-57	10/18/2010	Dress - Dresses/Skirts	25.00	A	12.50	10/18/2010	25.00	Unavailable
1-58	10/18/2010	Dress - Dresses/Skirts	19.00	A	9.50	10/18/2010	19.00	Unavailable
clothing		**6 Item(s)**	$64.00		$32.00		$64.00	
Grand Total:		**14 Item(s)**	$150.50		$75.25		$150.50	

Related Topics

Selecting the Right Report

SALES COMMISSION REPORT

Inventory Module → Reports → Reports → Sales (Inventory)

Copyright 2010, Resaleworld.com, Inc.

Displays sales detail information for each salesperson along with the price sold, profit, and commission amounts for each.

When to Use:

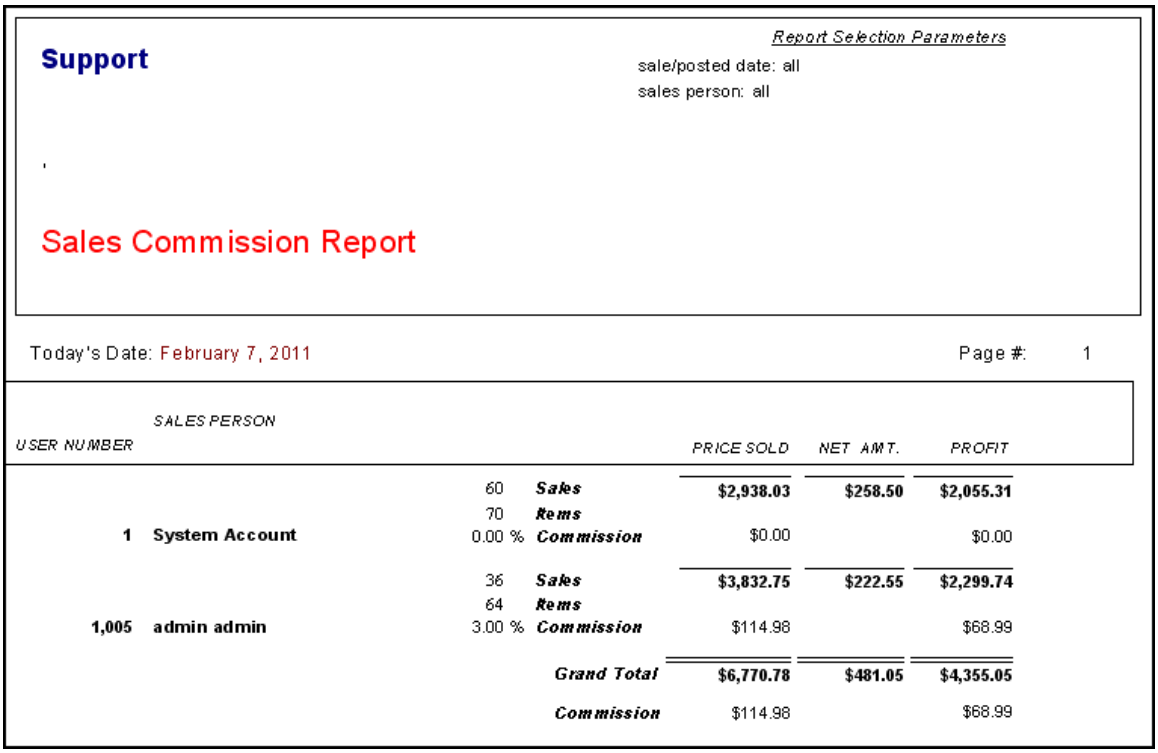
This report, which can also be considered a Sales by Salesperson Summary, helps to determine commission amounts based on the commission percentage set up for each Liberty User.

Criteria Choices:

- Sale/Posted Date
- Sale Status
- Sales Person

Sample Report

To view a sample of the Sales Commission Report, click here.



Support

Report Selection Parameters
sale/posted date: all
sales person: all

Sales Commission Report

Today's Date: February 7, 2011 Page #: 1

USER NUMBER	SALES PERSON			PRICE SOLD	NET AMT.	PROFIT
		60	*Sales*	$2,938.03	$258.50	$2,055.31
		70	*Rems*			
1	System Account	0.00 %	*Commission*	$0.00		$0.00
		36	*Sales*	$3,832.75	$222.55	$2,299.74
		64	*Rems*			
1,005	admin admin	3.00 %	*Commission*	$114.98		$68.99
			Grand Total	$6,770.78	$481.05	$4,355.05
			Commission	$114.98		$68.99

Related Topics

Selecting the Right Report

Copyright 2010, Resaleworld.com, Inc.

COUPON SUMMARY REPORT

Inventory Module → Reports → Reports → Sales (Non-Inventory)

Displays a list of all coupons, including a sales record of each time a coupon is used.

When to Use:

Run this report to find out anything about the use of coupons.

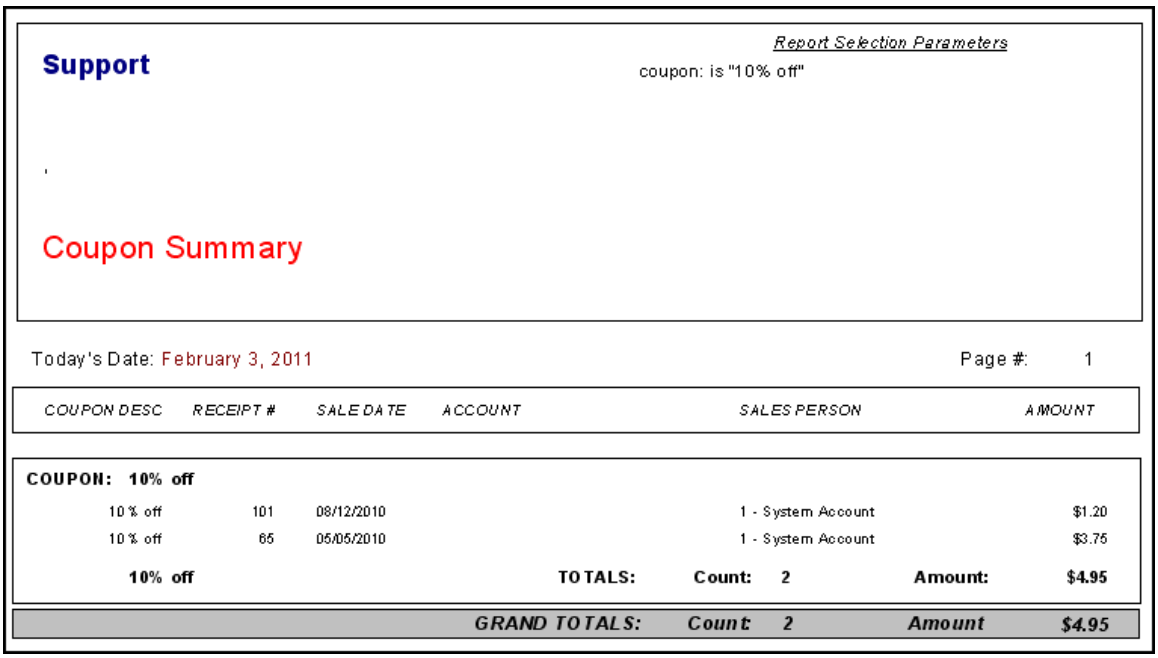
Criteria Choices:

- Active Coupon
- Coupon
- Coupon Type
- Expiration Date
- Sale Date
- Sales Person
- Terminal ID

Sample Report

To view a sample of the Coupon Summary Report, click here.

Copyright 2010, Resaleworld.com, Inc.



Support

Report Selection Parameters
coupon: is "10% off"

Coupon Summary

Today's Date: February 3, 2011 Page #: 1

COUPON DESC	RECEIPT #	SALE DATE	ACCOUNT	SALES PERSON	AMOUNT
COUPON: 10% off					
10 % off	101	08/12/2010		1 - System Account	$1.20
10 % off	65	05/05/2010		1 - System Account	$3.75
10% off			**TOTALS:**	**Count: 2**	**Amount: $4.95**
			GRAND TOTALS:	***Count: 2***	***Amount $4.95***

Related Topics

Selecting the Right Report

GIFT CARD TRANSACTION HISTORY REPORT

Inventory Module → Reports → Reports → Sales (Non-Inventory)

Displays all transactions for each Gift Card.

When to Use:

Use this report to track gift card purchases and balances.

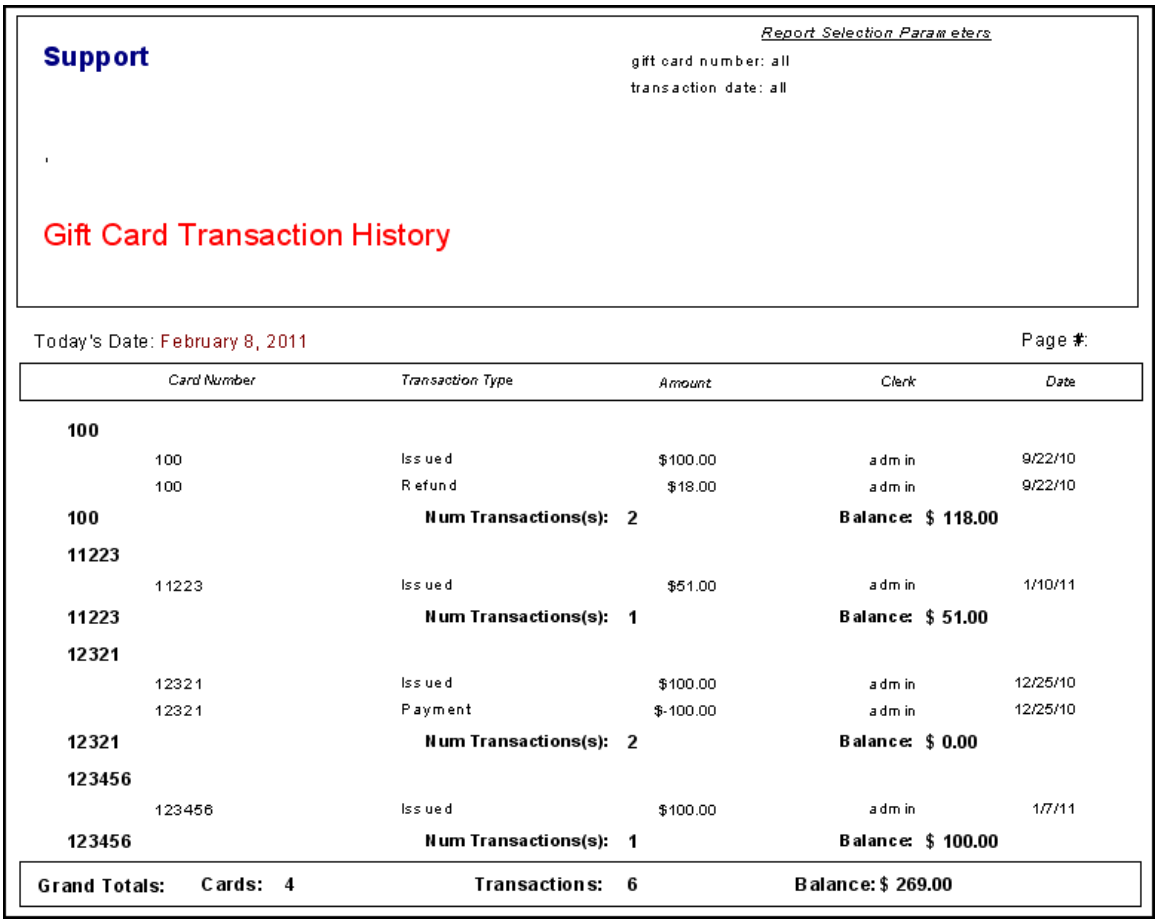
Copyright 2010, Resaleworld.com, Inc.

Criteria Choices:

- Gift Card Number
- Transaction Date
- Clerk
- Transaction Amount
- Transaction Type

Sample Report

To view a sample of the Gift Card Transaction History Report, click here.



Support

Report Selection Parameters
gift card number: all
transaction date: all

Gift Card Transaction History

Today's Date: February 8, 2011 Page #:

Card Number	Transaction Type	Amount	Clerk	Date
100				
100	Issued	$100.00	admin	9/22/10
100	Refund	$18.00	admin	9/22/10
100	**Num Transactions(s): 2**		**Balance: $ 118.00**	
11223				
11223	Issued	$51.00	admin	1/10/11
11223	**Num Transactions(s): 1**		**Balance: $ 51.00**	
12321				
12321	Issued	$100.00	admin	12/25/10
12321	Payment	$-100.00	admin	12/25/10
12321	**Num Transactions(s): 2**		**Balance: $ 0.00**	
123456				
123456	Issued	$100.00	admin	1/7/11
123456	**Num Transactions(s): 1**		**Balance: $ 100.00**	
Grand Totals:	**Cards: 4**	**Transactions: 6**	**Balance: $ 269.00**	

Related Topics

Selecting the Right Report

Copyright 2010, Resaleworld.com, Inc.

SALES FEE DETAIL REPORT

Inventory Module ➔ *Reports* ➔ *Reports* ➔ *Sales (Non-Inventory)*

This report shows all non-inventory fee transactions related to sales for a given time period.

When to Use:

This report is the easiest way to view records of any fees charged at the PoS.

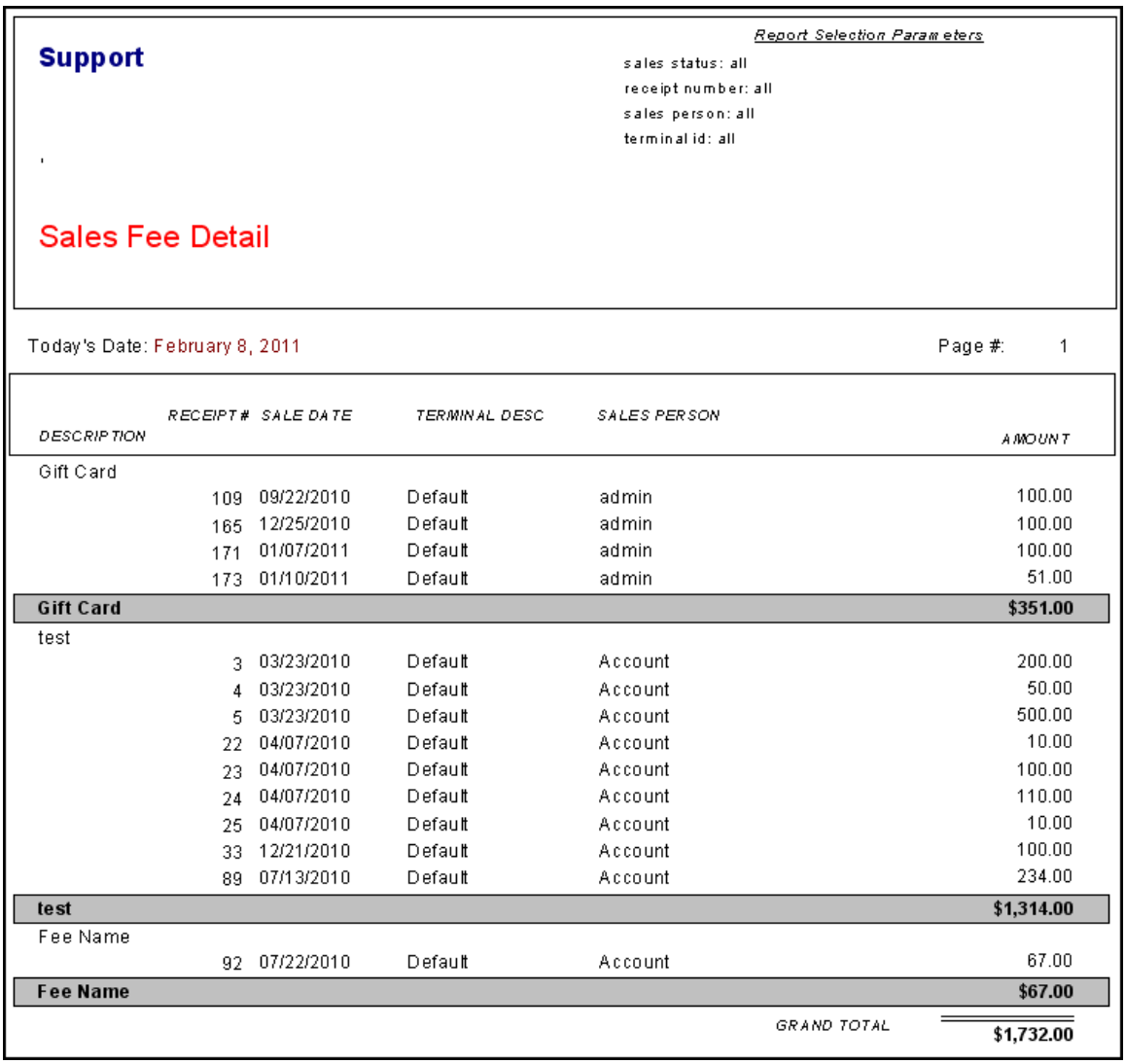
Criteria Choices:

- Sale/Posted Date
- Sales Status
- Receipt Number
- Sales Person
- Terminal ID
- Fee Type

Sample Report

To view a sample of the Sales Fee Detail Report, click here.

Copyright 2010, Resaleworld.com, Inc.



Support

Report Selection Parameters
sales status: all
receipt number: all
sales person: all
terminal id: all

Sales Fee Detail

Today's Date: February 8, 2011 Page #: 1

DESCRIPTION	RECEIPT #	SALE DATE	TERMINAL DESC	SALES PERSON	AMOUNT
Gift Card					
	109	09/22/2010	Default	admin	100.00
	165	12/25/2010	Default	admin	100.00
	171	01/07/2011	Default	admin	100.00
	173	01/10/2011	Default	admin	51.00
Gift Card					**$351.00**
test					
	3	03/23/2010	Default	Account	200.00
	4	03/23/2010	Default	Account	50.00
	5	03/23/2010	Default	Account	500.00
	22	04/07/2010	Default	Account	10.00
	23	04/07/2010	Default	Account	100.00
	24	04/07/2010	Default	Account	110.00
	25	04/07/2010	Default	Account	10.00
	33	12/21/2010	Default	Account	100.00
	89	07/13/2010	Default	Account	234.00
test					**$1,314.00**
Fee Name					
	92	07/22/2010	Default	Account	67.00
Fee Name					**$67.00**
				GRAND TOTAL	**$1,732.00**

Related Topics

Selecting the Right Report

DONOR RECEIPT REPORT

Inventory Module → Reports → Reports → Inventory

This report shows a list of items with no pricing information, along with a line that can be used to enter the donation value.

Note: This report automatically inserts a page break between accounts

When to Use:

There are two main differences between this report, and the Donor Receipt that can be run from inside an account in the Inventory Module:

- This report can be used to simultaneously prepare a Donation Receipt for multiple accounts.
- This report can be set to show only items that have already been posted as "Donated".

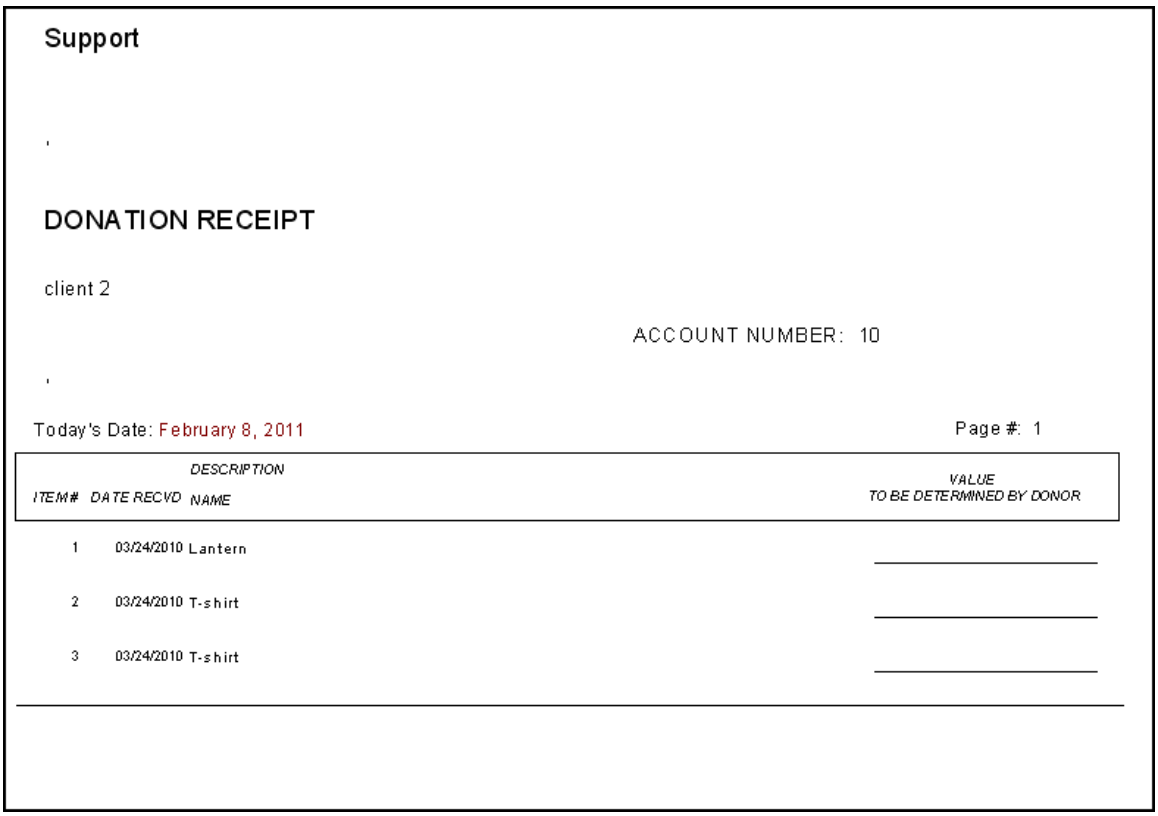
Criteria Choices:

- Account Number
- Active Account?
- Item Received Date
- Item Disposition
- Expiration Date

Sample Report

To view a sample of the Donor Receipt Report, click here.

Copyright 2010, Resaleworld.com, Inc.



Support

'

DONATION RECEIPT

client 2

ACCOUNT NUMBER: 10

'

Today's Date: February 8, 2011 Page #: 1

ITEM#	DATE RECVD	DESCRIPTION NAME	VALUE TO BE DETERMINED BY DONOR
1	03/24/2010	Lantern	
2	03/24/2010	T-shirt	
3	03/24/2010	T-shirt	

Related Topics

Selecting the Right Report

EXPIRED GROUP REPORT

Inventory Module ➔ *Reports* ➔ *Reports* ➔ *Inventory*

This report groups all sold items that have been posted as "Expired" as a result of the expiration date.

Note: You can set up each price code to expire items to a specific expire group. Expire Groups are set up from the Inventory Module by clicking ***Tools*** ➔ ***Maintain*** ➔ ***Expire Group****.*

When to Use:

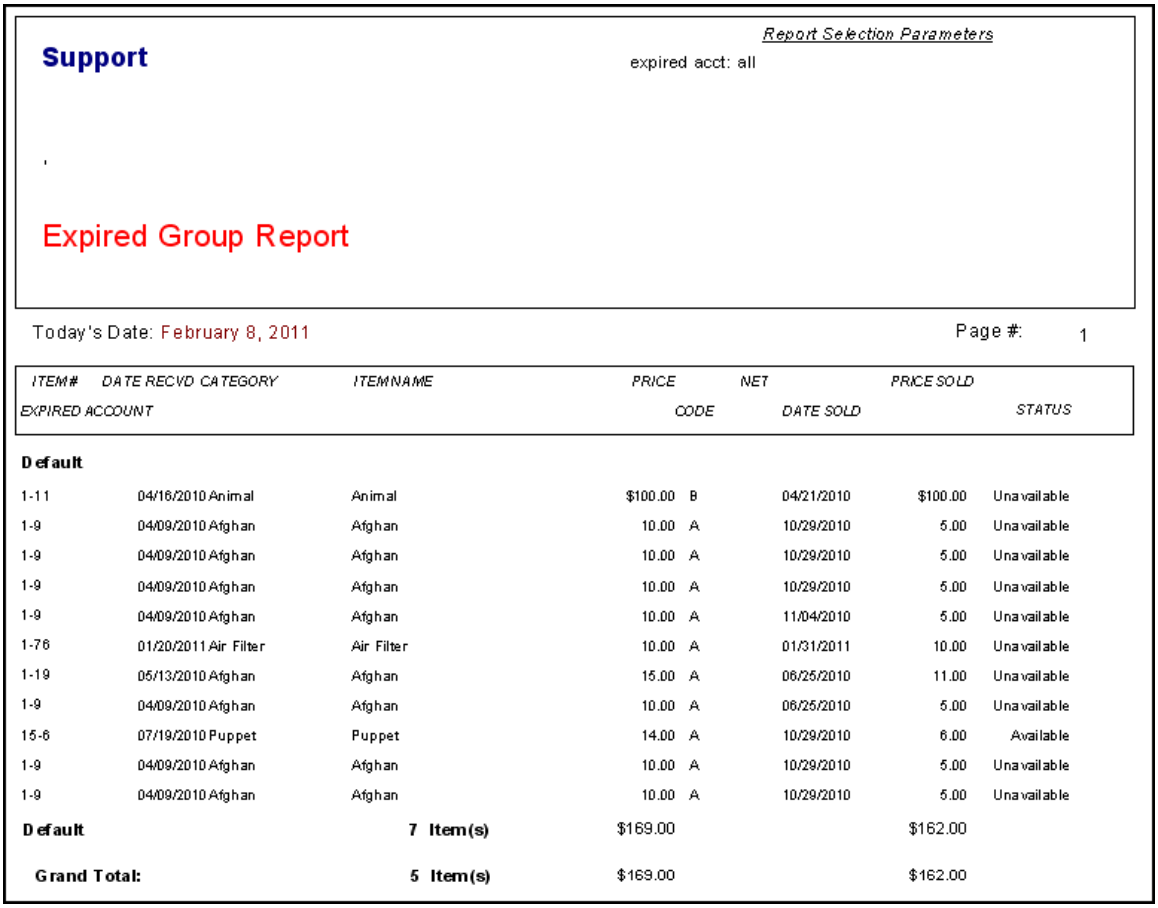
This report is a quick way to view sales records for expired items, and is the only way to show records based on the Expired Group to which they post.

Criteria Choices:

- Expired Account
- Date Sold/Posted
- Price Code

Sample Report

To view a sample of the Expired Group Report, click here.



Support

Report Selection Parameters

expired acct: all

'

Expired Group Report

Today's Date: February 8, 2011 Page #: 1

ITEM#	DATE RECVD	CATEGORY	ITEM NAME	PRICE CODE	NET	DATE SOLD	PRICE SOLD	STATUS
EXPIRED ACCOUNT								
Default								
1-11	04/16/2010	Animal	Animal	$100.00 B		04/21/2010	$100.00	Unavailable
1-9	04/09/2010	Afghan	Afghan	10.00 A		10/29/2010	5.00	Unavailable
1-9	04/09/2010	Afghan	Afghan	10.00 A		10/29/2010	5.00	Unavailable
1-9	04/09/2010	Afghan	Afghan	10.00 A		10/29/2010	5.00	Unavailable
1-9	04/09/2010	Afghan	Afghan	10.00 A		11/04/2010	5.00	Unavailable
1-76	01/20/2011	Air Filter	Air Filter	10.00 A		01/31/2011	10.00	Unavailable
1-19	05/13/2010	Afghan	Afghan	15.00 A		06/25/2010	11.00	Unavailable
1-9	04/09/2010	Afghan	Afghan	10.00 A		06/25/2010	5.00	Unavailable
15-6	07/19/2010	Puppet	Puppet	14.00 A		10/29/2010	6.00	Available
1-9	04/09/2010	Afghan	Afghan	10.00 A		10/29/2010	5.00	Unavailable
1-9	04/09/2010	Afghan	Afghan	10.00 A		10/29/2010	5.00	Unavailable
Default			**7 Item(s)**	$169.00			$162.00	
Grand Total:			**5 Item(s)**	$169.00			$162.00	

Related Topics

Selecting the Right Report

INVENTORY BY CATEGORY REPORT

Inventory Module → *Reports* → *Reports* → *Inventory*

This report displays all inventory by category and a summary of the quantity, price, and cost of available items.

When to Use:

Run this report to see details and/or summary info about inventory on hand and organized by category. This report includes many types of filter criteria that can be used to return a very specific set of results.

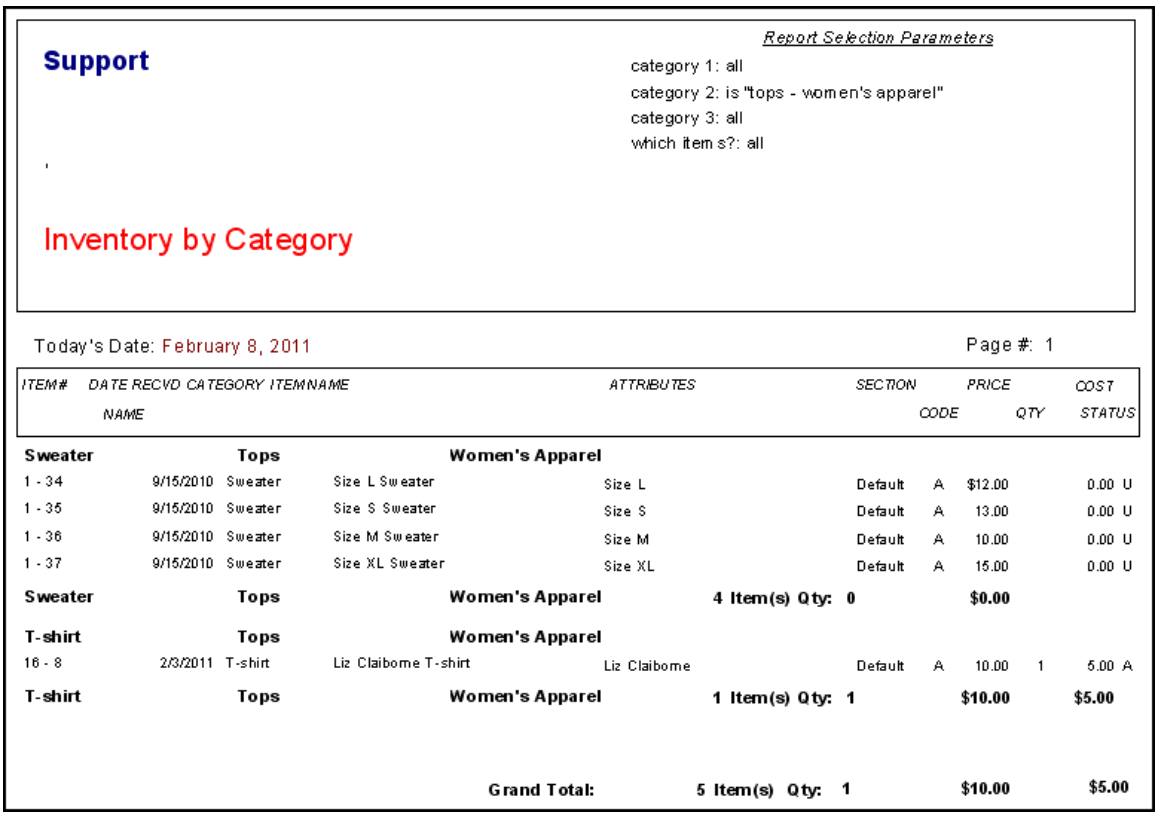
Criteria Choices:

- Category 1
- Category 2
- Category 3
- Which Items?
- Account Number
- Account Type
- Brand
- Filter Code
- Item Received Date
- Price Code
- Product Line
- Purchase Method
- Store Section
- Expiration Date
- Location

Sample Report

To view a sample of the Inventory by Category Report, click here.

Copyright 2010, Resaleworld.com, Inc.



Support

Report Selection Parameters
category 1: all
category 2: is "tops - women's apparel"
category 3: all
which items?: all

Inventory by Category

Today's Date: February 8, 2011 Page #: 1

ITEM#	DATE RECVD	CATEGORY NAME	ITEMNAME	ATTRIBUTES	SECTION	CODE	PRICE	QTY	COST	STATUS
Sweater		**Tops**		**Women's Apparel**						
1 - 34	9/15/2010	Sweater	Size L Sweater	Size L	Default	A	$12.00		0.00	U
1 - 35	9/15/2010	Sweater	Size S Sweater	Size S	Default	A	13.00		0.00	U
1 - 36	9/15/2010	Sweater	Size M Sweater	Size M	Default	A	10.00		0.00	U
1 - 37	9/15/2010	Sweater	Size XL Sweater	Size XL	Default	A	15.00		0.00	U
Sweater		**Tops**		**Women's Apparel**	**4 Item(s) Qty: 0**		**$0.00**			
T-shirt		**Tops**		**Women's Apparel**						
16 - 8	2/3/2011	T-shirt	Liz Claiborne T-shirt	Liz Claiborne	Default	A	10.00	1	5.00	A
T-shirt		**Tops**		**Women's Apparel**	**1 Item(s) Qty: 1**		**$10.00**		**$5.00**	
				Grand Total:	**5 Item(s) Qty: 1**		**$10.00**		**$5.00**	

Related Topics

Selecting the Right Report

ITEM DESCRIPTION - LONG FORMAT REPORT

Inventory Module ➔ *Reports* ➔ *Reports* ➔ *Inventory*

Displays inventory for each account including the full item description.

Copyright 2010, Resaleworld.com, Inc.

When to Use:

This inventory report shows a wide range of information for each item that is not included in most reports, including Description, Item Age, and Expire Date. This report includes many types of filter criteria that can be used to return a very specific set of results.

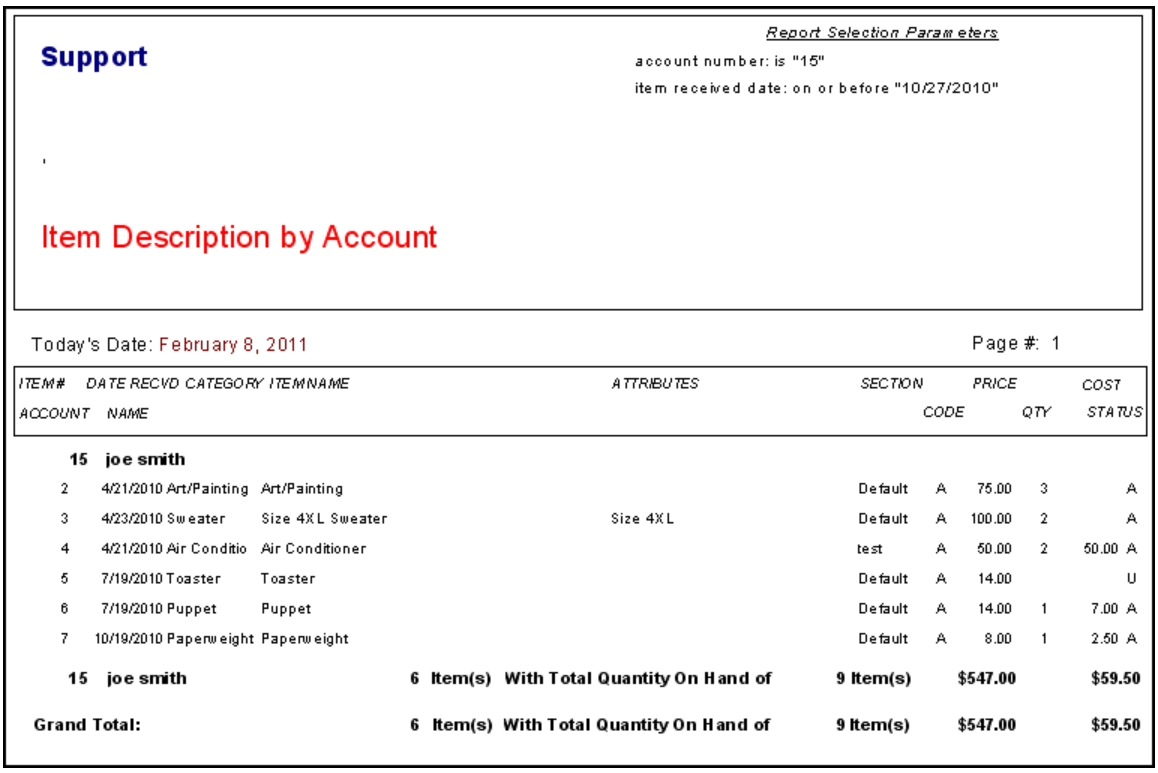
Criteria Choices:

- Account Number
- Item Received Date
- Filter Code
- Tag Color
- Item Status
- Added By
- Asking Price
- Brand
- Category 3
- Color
- Cost/Net
- Date Modified
- Item Age
- Item Disposition
- Last Date Item Added
- Last Name
- Modified By
- Price Code
- Size
- Store Section
- Tax Code
- Active Account?
- Product Line
- Expiration Date
- Location
- Number of Images
- Purchase Method
- Account Type

Sample Report

To view a sample of the Item Description - Long Format Report, click here.

Copyright 2010, Resaleworld.com, Inc.



Support

Report Selection Parameters
account number: is "15"
item received date: on or before "10/27/2010"

Item Description by Account

Today's Date: February 8, 2011 Page #: 1

ITEM# / ACCOUNT	DATE RECVD / NAME	CATEGORY	ITEMNAME	ATTRIBUTES	SECTION	CODE	PRICE	QTY	COST	STATUS
15	**joe smith**									
2	4/21/2010	Art/Painting	Art/Painting		Default	A	75.00	3		A
3	4/23/2010	Sweater	Size 4XL Sweater	Size 4XL	Default	A	100.00	2		A
4	4/21/2010	Air Conditio	Air Conditioner		test	A	50.00	2	50.00	A
5	7/19/2010	Toaster	Toaster		Default	A	14.00			U
6	7/19/2010	Puppet	Puppet		Default	A	14.00	1	7.00	A
7	10/19/2010	Paperweight	Paperweight		Default	A	8.00	1	2.50	A
15	**joe smith**		**6 Item(s)**	**With Total Quantity On Hand of**	**9 Item(s)**		**$547.00**		**$59.50**	
Grand Total:			**6 Item(s)**	**With Total Quantity On Hand of**	**9 Item(s)**		**$547.00**		**$59.50**	

Related Topics

Selecting the Right Report

ITEM DESCRIPTION BY ACCOUNT REPORT

Inventory Module → *Reports* → *Reports* → *Inventory*

Displays inventory information associated with each account.

When to Use:

This report is generally considered the main inventory report in Liberty.

Copyright 2010, Resaleworld.com, Inc.

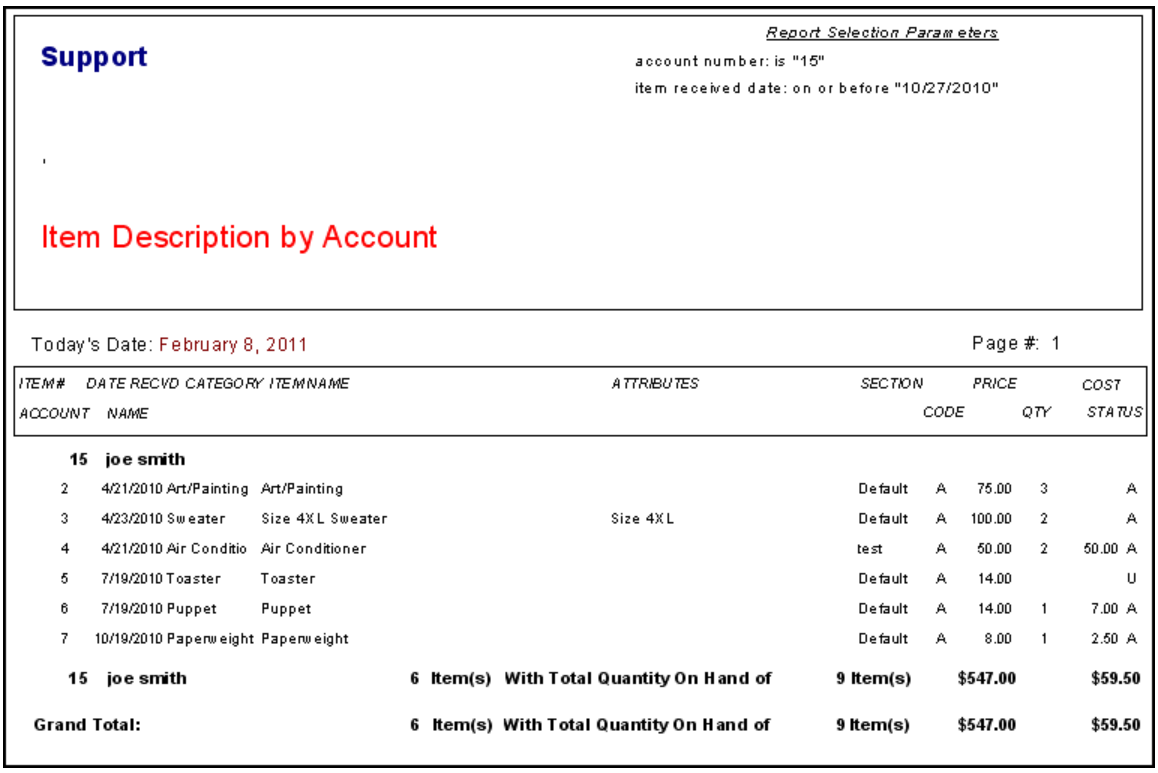
Criteria Choices:

- Account Number
- Account Type
- Added By
- Item Received Date
- Category 3
- Cost/Net
- Filter Code
- Item Disposition
- Store Section
- Tag Color
- Date Modified
- Item Status
- Last Date Item Added
- Last Name
- Modified By
- Pickup Date
- Price Code
- Purchase Method
- Active Account?
- Product Line
- Expiration Date
- Location
- Number of Images

Sample Report

To view a sample of the Item Description by Account Report, click here.

Copyright 2010, Resaleworld.com, Inc.



Support

Report Selection Parameters
account number: is "15"
item received date: on or before "10/27/2010"

Item Description by Account

Today's Date: February 8, 2011 Page #: 1

ITEM# / ACCOUNT	DATE RECVD / NAME	CATEGORY	ITEMNAME	ATTRIBUTES	SECTION	CODE	PRICE	QTY	COST	STATUS
15	**joe smith**									
2	4/21/2010	Art/Painting	Art/Painting		Default	A	75.00	3		A
3	4/23/2010	Sweater	Size 4XL Sweater	Size 4XL	Default	A	100.00	2		A
4	4/21/2010	Air Conditio	Air Conditioner		test	A	50.00	2	50.00	A
5	7/19/2010	Toaster	Toaster		Default	A	14.00			U
6	7/19/2010	Puppet	Puppet		Default	A	14.00	1	7.00	A
7	10/19/2010	Paperweight	Paperweight		Default	A	8.00	1	2.50	A
15	**joe smith**	**6 Item(s)**	**With Total Quantity On Hand of**		**9 Item(s)**		**$547.00**		**$59.50**	
Grand Total:		**6 Item(s)**	**With Total Quantity On Hand of**		**9 Item(s)**		**$547.00**		**$59.50**	

Related Topics

Selecting the Right Report

ITEM RECEIVED SUMMARY REPORT

Inventory Module → Reports → Reports → Inventory

This report summarizes key information for items received within a certain time frame.

Note: This report does not include individual records, only a summary page.

When to Use:

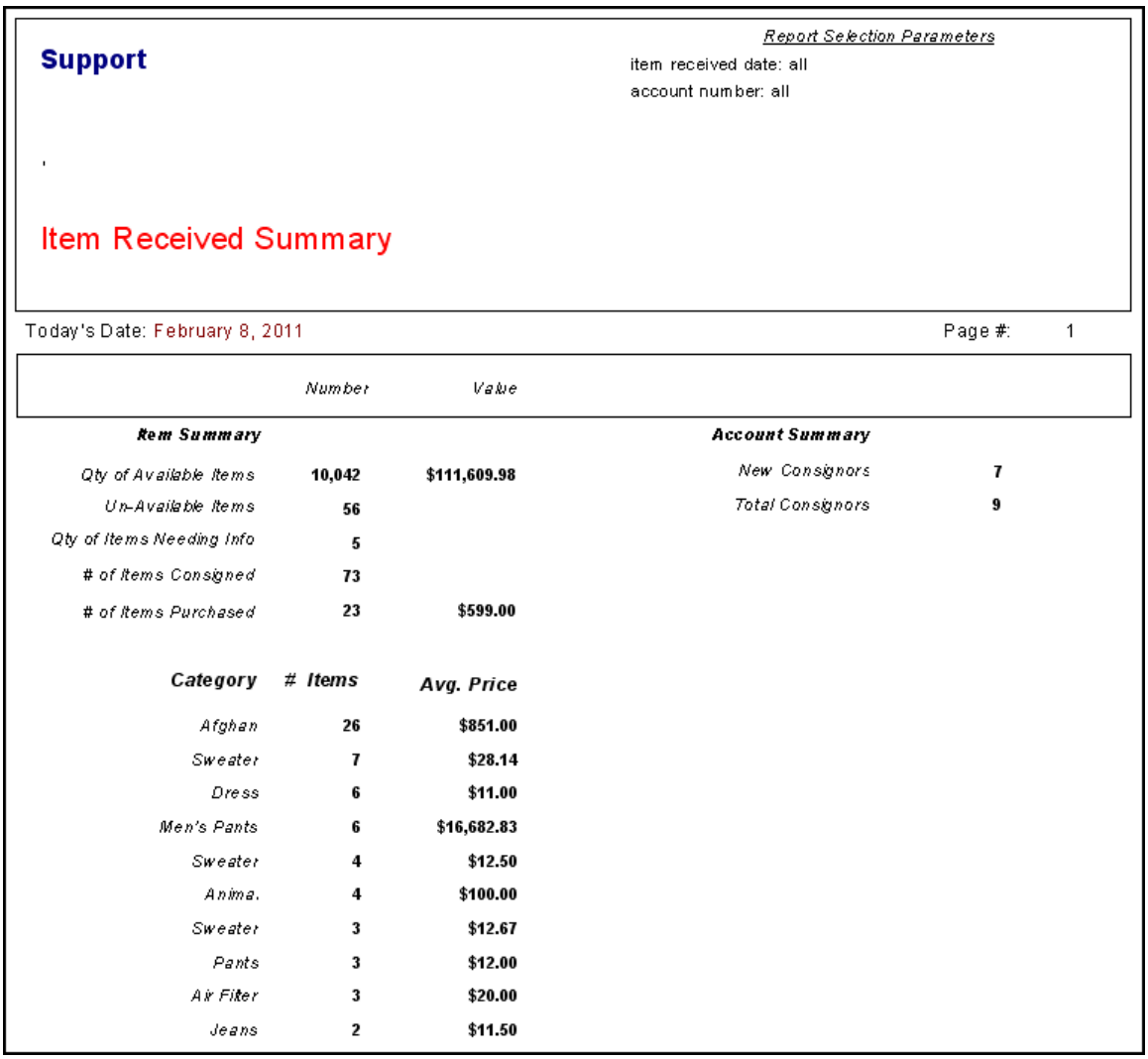
Run this report to see a quick overview of inventory intake, including a breakdown of the top ten categories.

Criteria Choices:

- Account Number
- Account Type
- Item Received Date
- Filter Code
- Price Code
- Location

Sample Report

To view a sample of the Items Received Summary Report, click here.



Support

Report Selection Parameters
item received date: all
account number: all

'

Item Received Summary

Today's Date: February 8, 2011 Page #: 1

	Number	Value
Item Summary		
Qty of Available Items	10,042	$111,609.98
Un-Available Items	56	
Qty of Items Needing Info	5	
# of Items Consigned	73	
# of Items Purchased	23	$599.00

Account Summary	
New Consignors	7
Total Consignors	9

Category	# Items	Avg. Price
Afghan	26	$851.00
Sweater	7	$28.14
Dress	6	$11.00
Men's Pants	6	$16,682.83
Sweater	4	$12.50
Anima.	4	$100.00
Sweater	3	$12.67
Pants	3	$12.00
Air Filter	3	$20.00
Jeans	2	$11.50

Copyright 2010, Resaleworld.com, Inc.

Related Topics

Selecting the Right Report

ITEM SALES SUMMARY REPORT

Inventory Module ➔ *Reports* ➔ *Reports* ➔ *Inventory*

This report summarizes key information for items received within a specified time frame.

> *Note: This report does not include individual records, only a summary page.*

When to Use:

Run this report to see a quick overview of inventory movement.

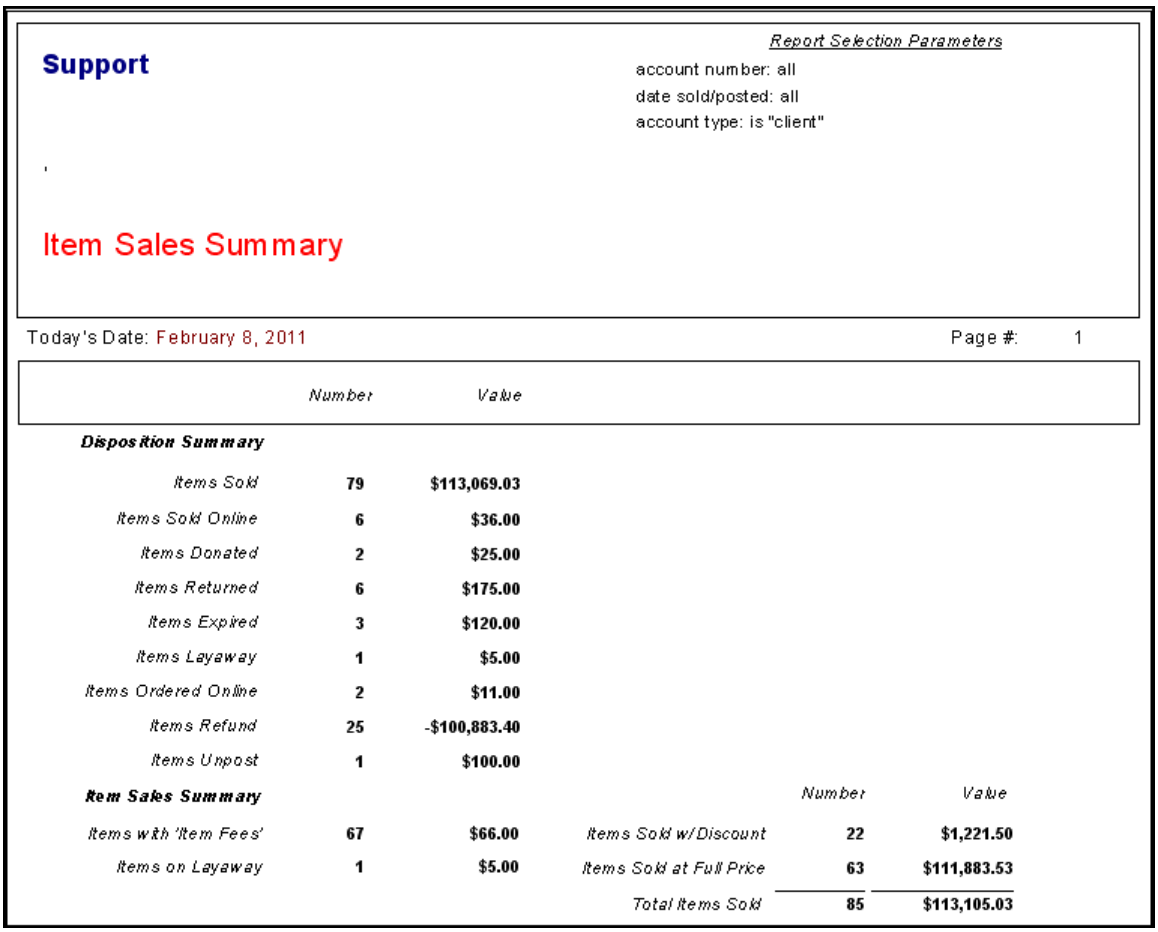
Criteria Choices:

- Account Number
- Account Type
- Date Sold/Posted
- Filter Code

Sample Report

To view a sample of the Item Sales Summary Report, click here.

Copyright 2010, Resaleworld.com, Inc.



Support

Report Selection Parameters
account number: all
date sold/posted: all
account type: is "client"

Item Sales Summary

Today's Date: February 8, 2011 Page #: 1

	Number	Value
Disposition Summary		
Items Sold	**79**	**$113,069.03**
Items Sold Online	**6**	**$36.00**
Items Donated	**2**	**$25.00**
Items Returned	**6**	**$175.00**
Items Expired	**3**	**$120.00**
Items Layaway	**1**	**$5.00**
Items Ordered Online	**2**	**$11.00**
Items Refund	**25**	**-$100,883.40**
Items Unpost	**1**	**$100.00**

	Number	Value		Number	Value
Item Sales Summary					
Items with 'Item Fees'	**67**	**$66.00**	*Items Sold w/Discount*	**22**	**$1,221.50**
Items on Layaway	**1**	**$5.00**	*Items Sold at Full Price*	**63**	**$111,883.53**
			Total Items Sold	**85**	**$113,105.03**

Related Topics

Selecting the Right Report

MARKDOWN REPORT

Inventory Module → *Reports* → *Reports* → *Inventory*

Displays the markdown schedule for each available item.

Copyright 2010, Resaleworld.com, Inc.

When to Use:

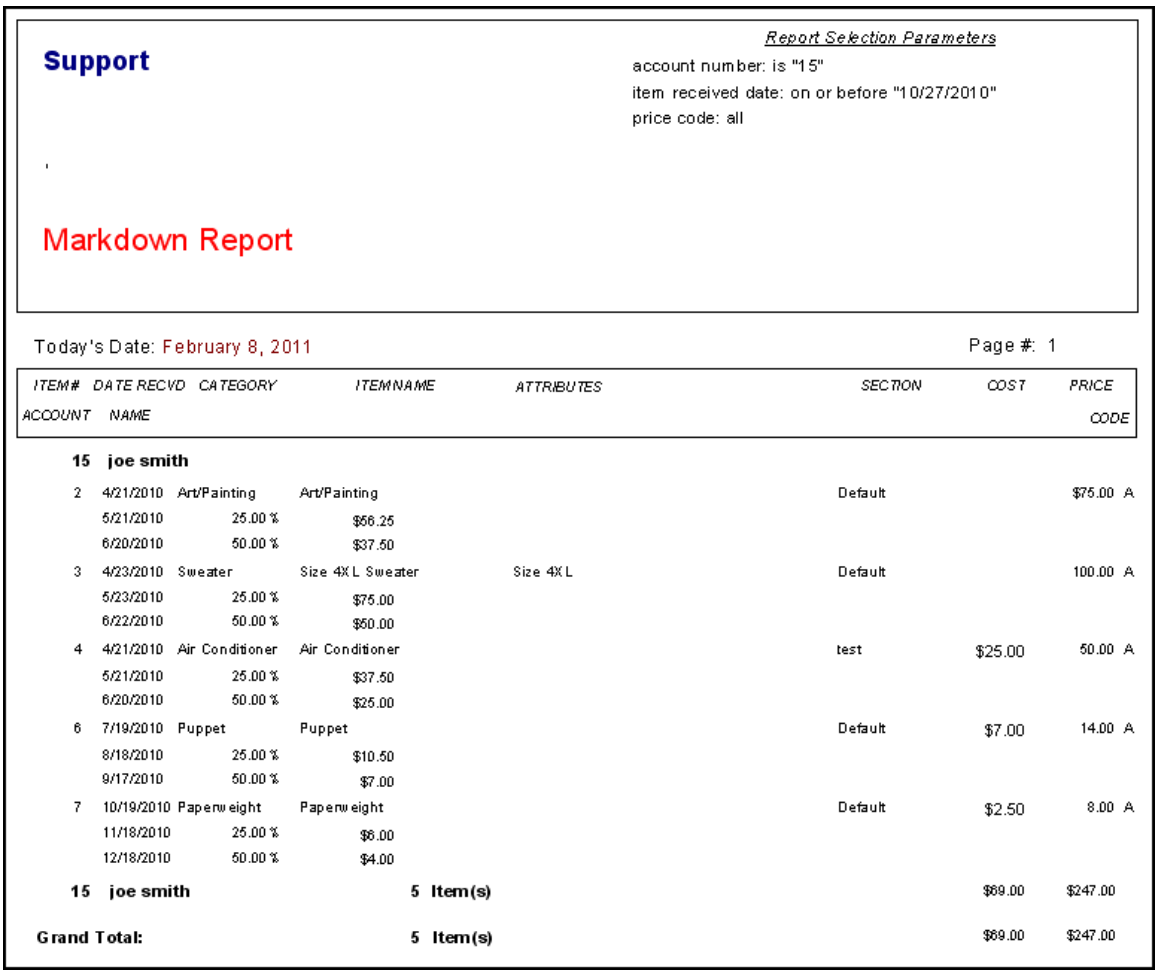
Run this report to see a listing of upcoming markdowns. This report is very useful for those who mark down tags by hand!

Criteria Choices:

- Account Number
- Item Received Date
- Price Code
- Markdown Date

Sample Report

To view a sample of the Markdown Report, click here.



Support

Report Selection Parameters
account number: is "15"
item received date: on or before "10/27/2010"
price code: all

Markdown Report

Today's Date: February 8, 2011 Page #: 1

ITEM#	DATE RECVD	CATEGORY	ITEMNAME	ATTRIBUTES	SECTION	COST	PRICE	
ACCOUNT	NAME						CODE	
15	**joe smith**							
2	4/21/2010	Art/Painting	Art/Painting		Default		$75.00	A
	5/21/2010	25.00 %	$56.25					
	6/20/2010	50.00 %	$37.50					
3	4/23/2010	Sweater	Size 4X L Sweater	Size 4X L	Default		100.00	A
	5/23/2010	25.00 %	$75.00					
	6/22/2010	50.00 %	$50.00					
4	4/21/2010	Air Conditioner	Air Conditioner		test	$25.00	50.00	A
	5/21/2010	25.00 %	$37.50					
	6/20/2010	50.00 %	$25.00					
6	7/19/2010	Puppet	Puppet		Default	$7.00	14.00	A
	8/18/2010	25.00 %	$10.50					
	9/17/2010	50.00 %	$7.00					
7	10/19/2010	Paperweight	Paperweight		Default	$2.50	8.00	A
	11/18/2010	25.00 %	$6.00					
	12/18/2010	50.00 %	$4.00					
15	**joe smith**		**5 Item(s)**			$69.00	$247.00	
Grand Total:			**5 Item(s)**			$69.00	$247.00	

Related Topics

Selecting the Right Report

POSTED ITEMS DETAIL REPORT

Inventory Module ➔ *Reports* ➔ *Reports* ➔ *Inventory*

Displays a transaction history of items Posted or Unposted using Liberty 4's Post Items feature, organized by account.

When to Use:

Run the report to see full details or summary information on posted items.

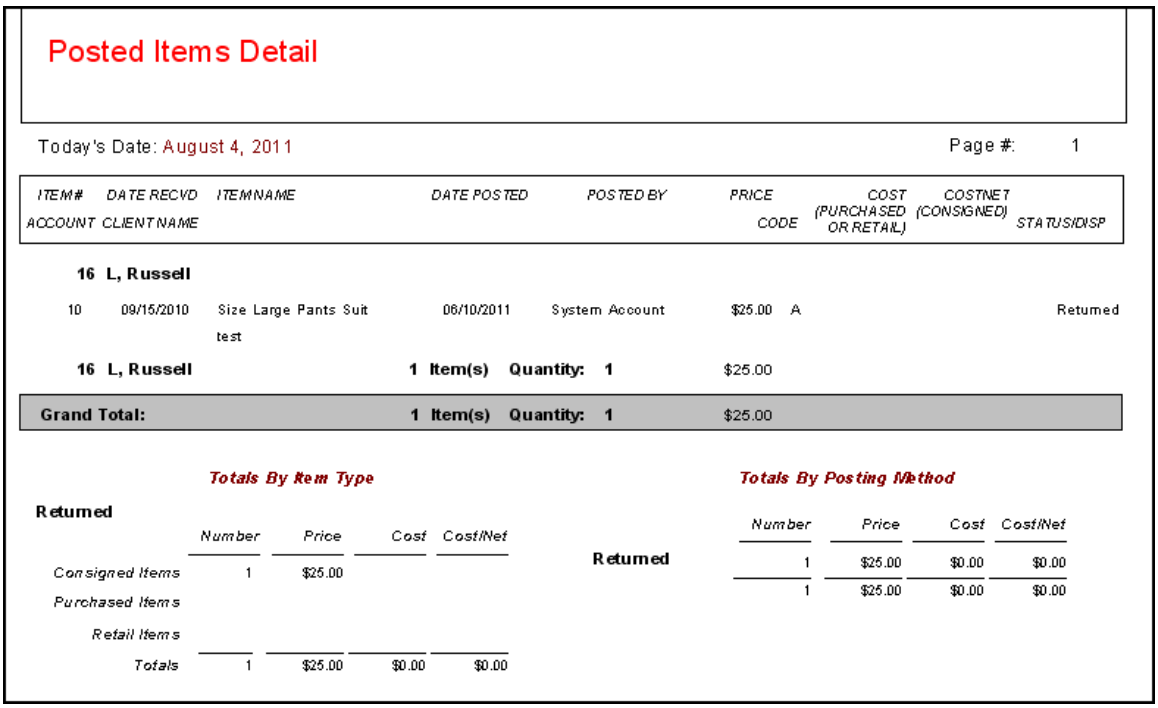
Criteria Choices:

- Active Account?
- Account Number
- Account Type
- Date Posted
- Posting Mode
- Category 1
- Category 2
- Category 3
- Cost/Net
- Expiration Date
- Filter Code
- Item Received Date
- Item Status
- Location
- Price Code
- Product Line
- Purchase Method

Sample Report

To view a sample of the Item Posted Items Detail Report, click here.

Copyright 2010, Resaleworld.com, Inc.



Posted Items Detail

Today's Date: August 4, 2011 Page #: 1

ITEM# ACCOUNT	DATE RECVD CLIENT NAME	ITEM NAME	DATE POSTED	POSTED BY	PRICE CODE	COST (PURCHASED OR RETAIL)	COST NET (CONSIGNED)	STATUS/DISP
16	**L, Russell**							
10	09/15/2010	Size Large Pants Suit test	06/10/2011	System Account	$25.00 A			Returned
16	**L, Russell**	**1 Item(s)**	**Quantity:**	**1**	$25.00			
Grand Total:		**1 Item(s)**	**Quantity:**	**1**	$25.00			

Totals By Item Type

Returned

	Number	Price	Cost	Cost/Net
Consigned Items	1	$25.00		
Purchased Items				
Retail Items				
Totals	1	$25.00	$0.00	$0.00

Totals By Posting Method

Returned

Number	Price	Cost	Cost/Net
1	$25.00	$0.00	$0.00
1	$25.00	$0.00	$0.00

Related Topics

Selecting the Right Report

WEB INVENTORY DETAIL REPORT

Inventory Module → *Reports* → *Reports* → *Inventory*

Displays all information relative to items that have been flagged to be listed on the web.

When to Use:

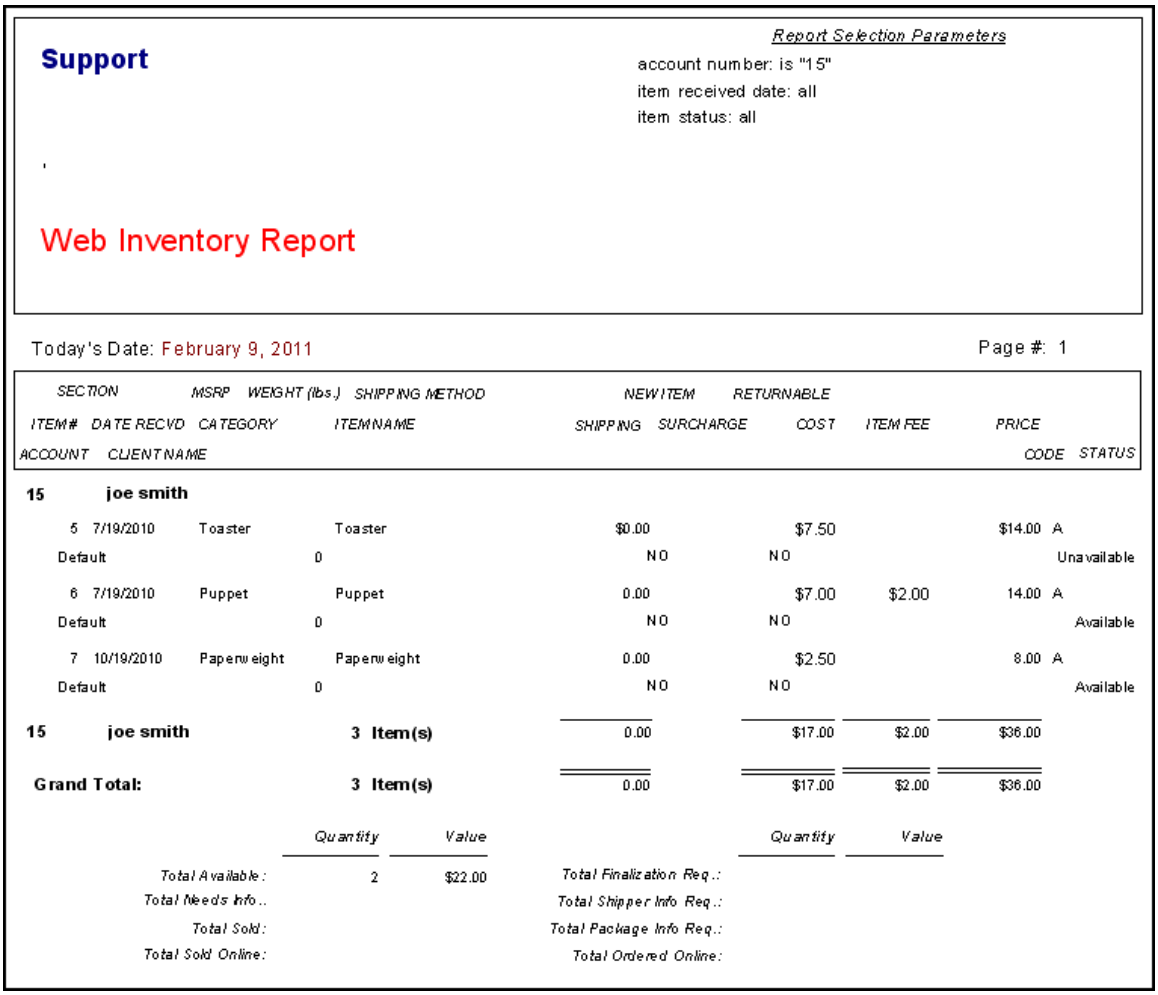
Run this report to view information specific only to web items (such as weight and shipping) that most reports do not show.

Criteria Choices:

- Account Number
- Item Received Date
- Item Status
- Auction End Date
- Auction Status
- Category 3
- Last Name
- Active Account?
- Number of Images

Sample Report

To view a sample of the Web Inventory Detail Report, click here.



Support

Report Selection Parameters
account number: is "15"
item received date: all
item status: all

Web Inventory Report

Today's Date: February 9, 2011 Page #: 1

SECTION / ITEM# / ACCOUNT	MSRP / DATE RECVD / CLIENT NAME	WEIGHT (lbs.) / CATEGORY	SHIPPING METHOD / ITEM NAME	NEW ITEM SHIPPING	RETURNABLE SURCHARGE	COST	ITEM FEE	PRICE	CODE	STATUS
15	**joe smith**									
5	7/19/2010	Toaster	Toaster	$0.00		$7.50		$14.00	A	
Default		0		NO	NO					Unavailable
6	7/19/2010	Puppet	Puppet	0.00		$7.00	$2.00	14.00	A	
Default		0		NO	NO					Available
7	10/19/2010	Paperweight	Paperweight	0.00		$2.50		8.00	A	
Default		0		NO	NO					Available
15	**joe smith**	**3**	**Item(s)**	0.00		$17.00	$2.00	$36.00		
Grand Total:		**3**	**Item(s)**	0.00		$17.00	$2.00	$36.00		

	Quantity	Value		Quantity	Value
Total Available:	2	$22.00	Total Finalization Req.:		
Total Needs Info..			Total Shipper Info Req.:		
Total Sold:			Total Package Info Req.:		
Total Sold Online:			Total Ordered Online:		

Related Topics

Selecting the Right Report

Accounts Payable – By Account Report

Inventory Module ➔ *Reports* ➔ *Reports* ➔ *Payouts*

Displays all transactions that could be included in a payout if an account needs to be paid.

> *Note: While there are filtering criteria for date ranges, this report is intended to be run over a full date range in order to accurately show all open transactions.*

Also note that certain settings, such as Pay Delays, can cause payouts to reflect a different number than this obligation report.

When to Use:

Run this report to see open (unpaid) transactions for consignors.

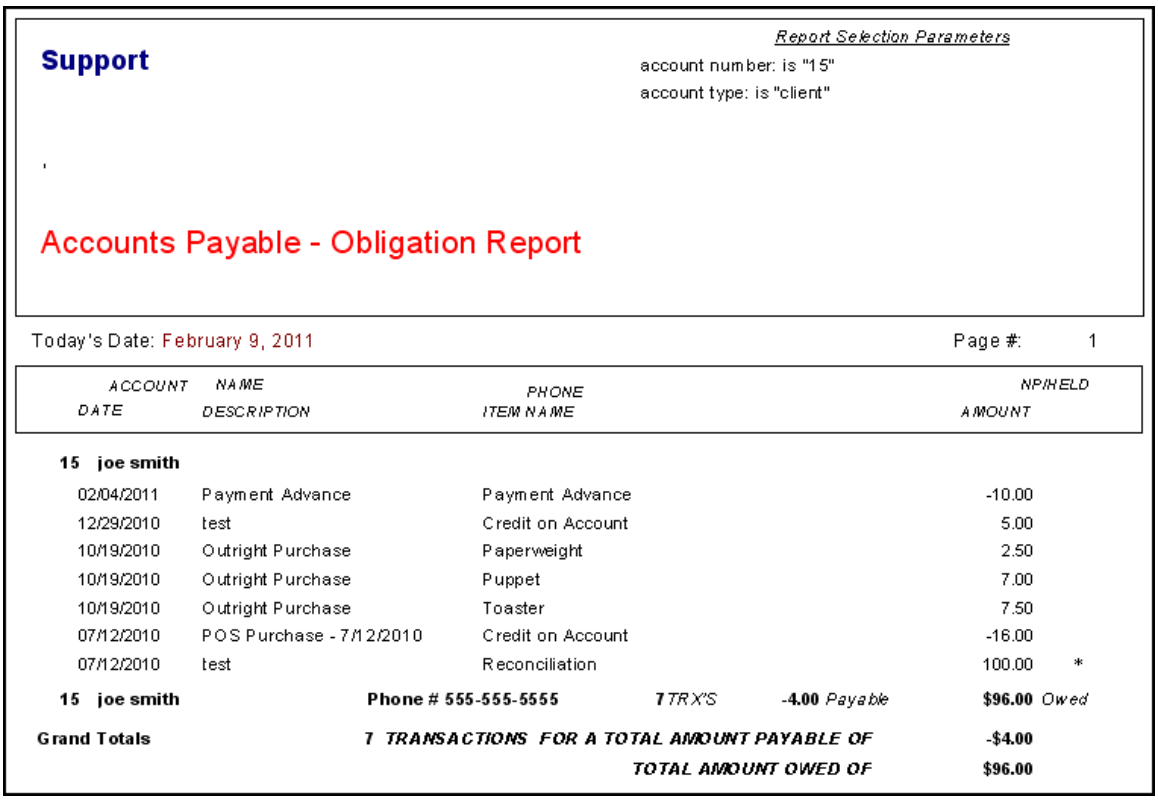
Criteria Choices:

- Account Number
- Account Type
- Active Account?
- Filter Code
- Held Transaction?
- Last Transaction Date
- Payable
- Transaction Code
- Transaction Date

Sample Report

To view a sample of the Accounts Payable by Account Report, click here.

Copyright 2010, Resaleworld.com, Inc.



Support

Report Selection Parameters
account number: is "15"
account type: is "client"

Accounts Payable - Obligation Report

Today's Date: February 9, 2011 Page #: 1

ACCOUNT / DATE	NAME / DESCRIPTION	PHONE / ITEM NAME			NP/HELD / AMOUNT	
15 joe smith						
02/04/2011	Payment Advance	Payment Advance			-10.00	
12/29/2010	test	Credit on Account			5.00	
10/19/2010	Outright Purchase	Paperweight			2.50	
10/19/2010	Outright Purchase	Puppet			7.00	
10/19/2010	Outright Purchase	Toaster			7.50	
07/12/2010	POS Purchase - 7/12/2010	Credit on Account			-16.00	
07/12/2010	test	Reconciliation			100.00	*
15 joe smith		**Phone # 555-555-5555**	***7 TRX'S***	**-4.00** *Payable*	**$96.00** *Owed*	
Grand Totals		***7 TRANSACTIONS FOR A TOTAL AMOUNT PAYABLE OF***			**-$4.00**	
		TOTAL AMOUNT OWED OF			**$96.00**	

Related Topics

Selecting the Right Report

Accounts Payable - By Last Name Report

Inventory Module → *Reports* → *Reports* → *Payouts*

Displays all transactions that could be included in a payout if an account needs to be paid and sorted by the last name on the account.

Copyright 2010, Resaleworld.com, Inc.

Note: While there are filtering criteria for date ranges, this report is intended to be run over a full date range in order to accurately show all open transactions.

Also note that certain settings, such as Pay Delays, can cause payouts to reflect a different number than this obligation report.

When to Use:

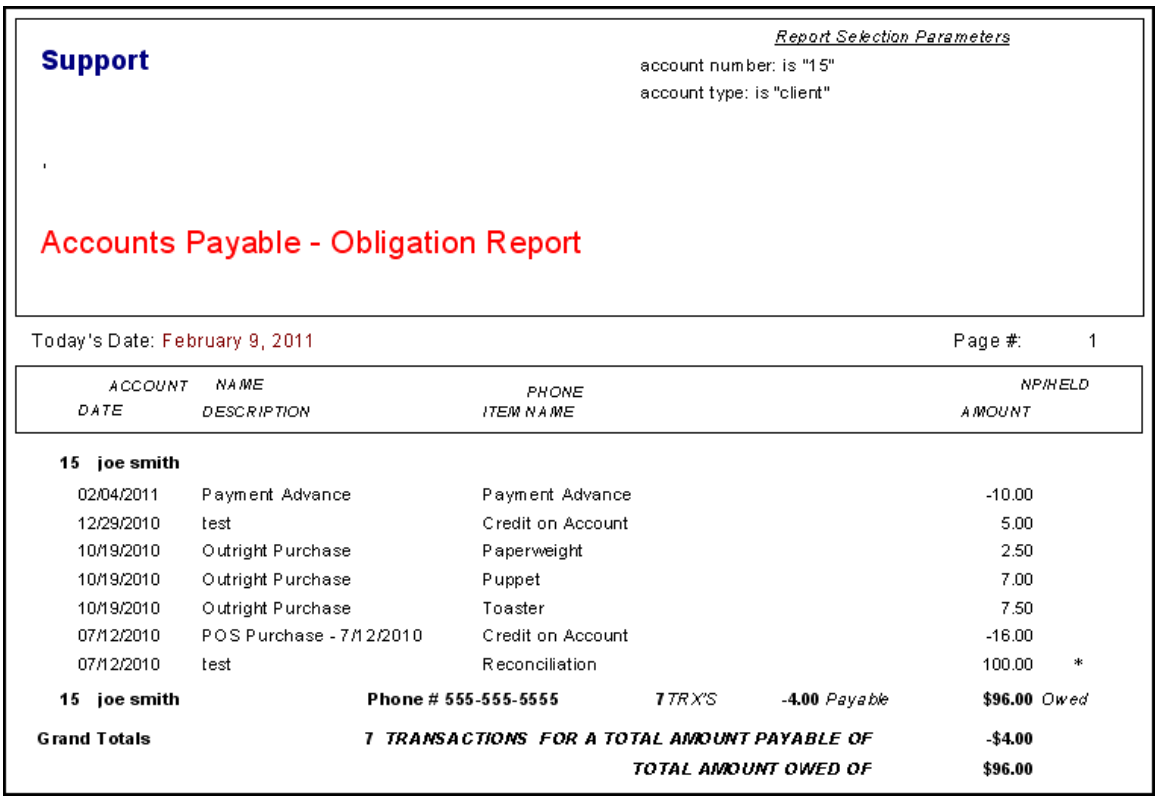
Run this report to see open (unpaid) transactions for consignors.

Criteria Choices:

- Account Number
- Account Type
- Active Account?
- Filter Code
- Held Transaction?
- Last Transaction Date
- Payable
- Transaction Code
- Transaction Date

Sample Report

To view a sample of the Accounts Payable by Last Name Report, click here.



Support

Report Selection Parameters
account number: is "15"
account type: is "client"

Accounts Payable - Obligation Report

Today's Date: February 9, 2011 Page #: 1

ACCOUNT / DATE	NAME / DESCRIPTION	PHONE / ITEM NAME			NP/HELD / AMOUNT	
15 joe smith						
02/04/2011	Payment Advance	Payment Advance			-10.00	
12/29/2010	test	Credit on Account			5.00	
10/19/2010	Outright Purchase	Paperweight			2.50	
10/19/2010	Outright Purchase	Puppet			7.00	
10/19/2010	Outright Purchase	Toaster			7.50	
07/12/2010	POS Purchase - 7/12/2010	Credit on Account			-16.00	
07/12/2010	test	Reconciliation			100.00	*
15 joe smith		**Phone # 555-555-5555**	*7 TRX'S*	**-4.00** *Payable*	**$96.00** *Owed*	
Grand Totals		***7 TRANSACTIONS FOR A TOTAL AMOUNT PAYABLE OF***			**-$4.00**	
		TOTAL AMOUNT OWED OF			**$96.00**	

Related Topics

Selecting the Right Report

CHECK/PAYOUT DETAIL - EXTENDED REPORT

Inventory Module → *Reports* → *Reports* → *Payouts*

Displays all transactions related to each payout/check number. Identical to Check/Payout Detail Report, with two additional columns: Price Sold and the Description for transactions specific to a particular item.

Note: Suppress Group Detail and Group Footer to view only a list of payouts.

When to Use:

Run this report to see an overview of issued payouts, to find specific payouts, or to see payouts that are a specific status (Cleared, Deleted, etc).

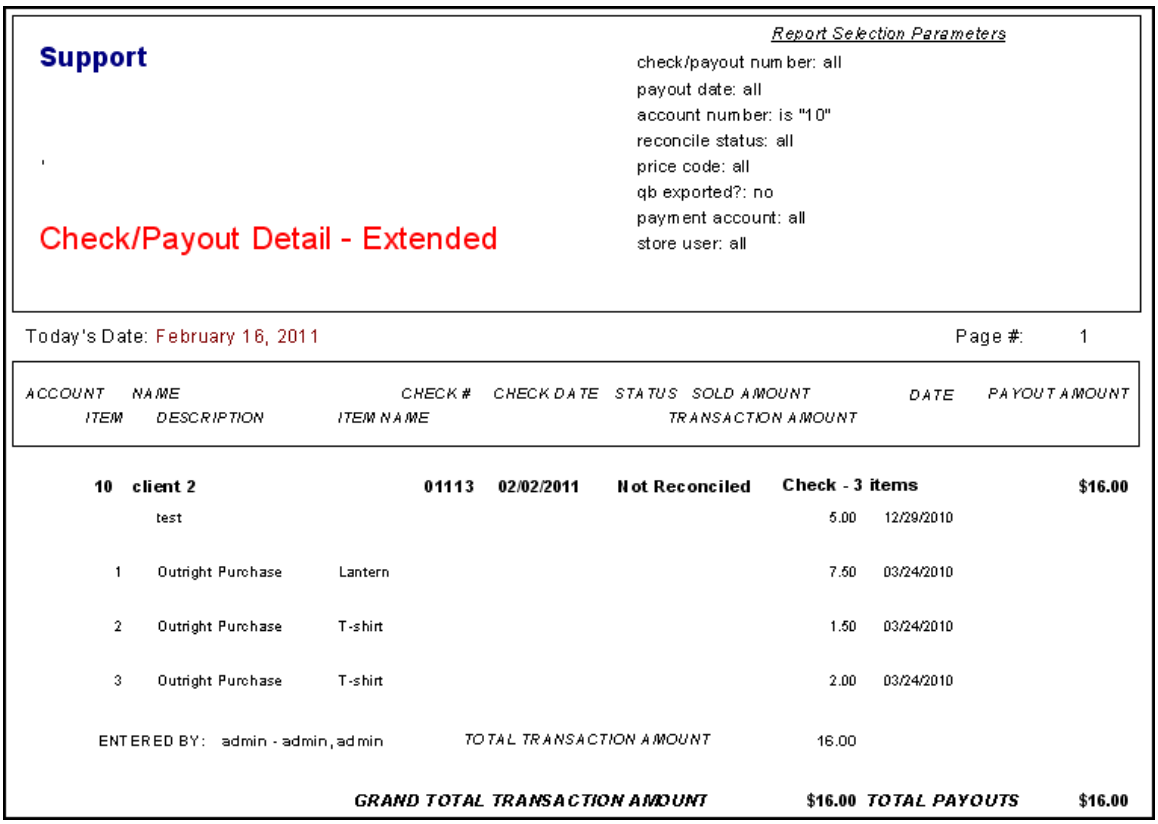
Criteria Choices:

- Account Number
- Active Account?
- Check/Payout Number
- Filter Code
- Payment Account
- Payout Date
- Price Code
- QB Exported?
- Reconcile Status
- Store User

Sample Report

To view a sample of the Check/Payout Detail - Extended Report, click here.

Copyright 2010, Resaleworld.com, Inc.



Support

Report Selection Parameters
check/payout number: all
payout date: all
account number: is "10"
reconcile status: all
price code: all
qb exported?: no
payment account: all
store user: all

Check/Payout Detail - Extended

Today's Date: February 16, 2011 Page #: 1

ACCOUNT / ITEM	NAME / DESCRIPTION	CHECK # / ITEM NAME	CHECK DATE	STATUS	SOLD AMOUNT / TRANSACTION AMOUNT	DATE	PAYOUT AMOUNT
10	**client 2**	**01113**	**02/02/2011**	**Not Reconciled**	**Check - 3 items**		**$16.00**
	test				5.00	12/29/2010	
1	Outright Purchase	Lantern			7.50	03/24/2010	
2	Outright Purchase	T-shirt			1.50	03/24/2010	
3	Outright Purchase	T-shirt			2.00	03/24/2010	
ENTERED BY:	admin - admin, admin		TOTAL TRANSACTION AMOUNT		16.00		
			GRAND TOTAL TRANSACTION AMOUNT		**$16.00**	**TOTAL PAYOUTS**	**$16.00**

Related Topics

Selecting the Right Report

CHECK/PAYOUT DETAIL REPORT

Inventory Module → Reports → Reports → Payouts

Displays all transactions related to each payout/check number.

Note: Suppress Group Detail and Group Footer to view only a list of payouts.

When to Use:

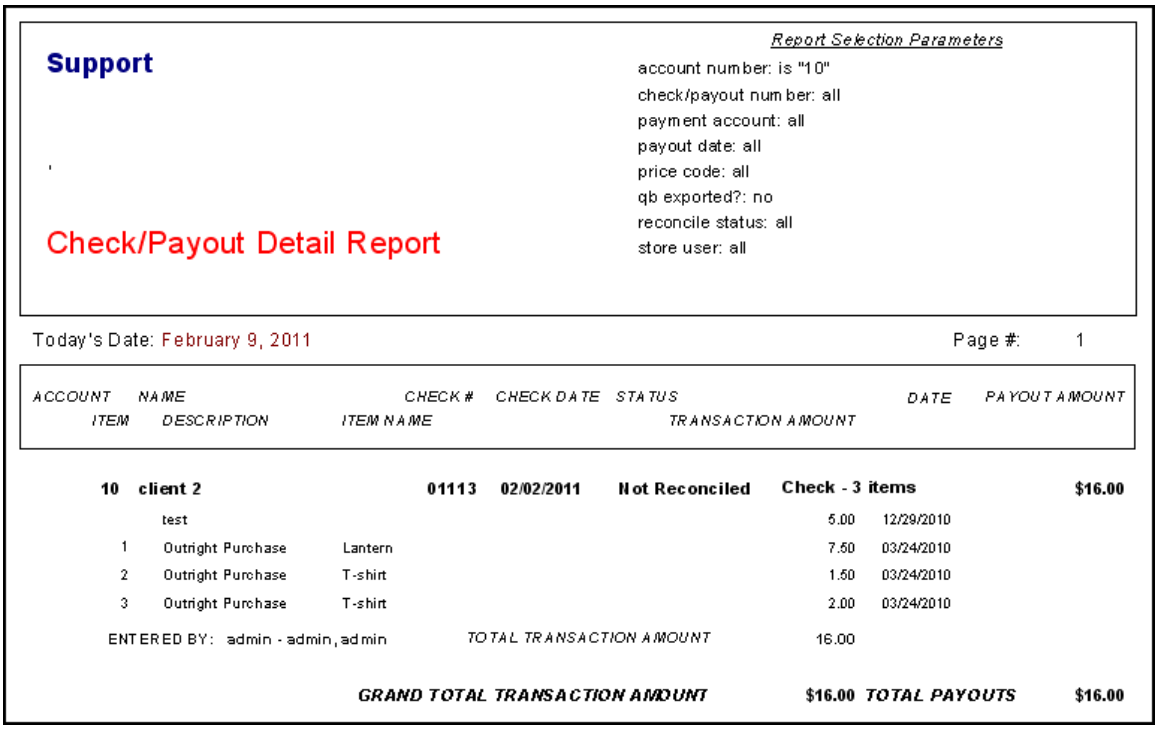
Run this report to see an overview of issued payouts, to find specific payouts, or to see payouts that are a specific status (Cleared, Deleted, etc).

Criteria Choices:

- Account Number
- Active Account?
- Check/Payout Number
- Filter Code
- Payment Account
- Payout Date
- Price Code
- QB Exported?
- Reconcile Status
- Store User

Sample Report

To view a sample of the Check/Payout Detail Report, click here.



Support

'

Check/Payout Detail Report

Report Selection Parameters
account number: is "10"
check/payout number: all
payment account: all
payout date: all
price code: all
qb exported?: no
reconcile status: all
store user: all

Today's Date: February 9, 2011 Page #: 1

ACCOUNT	NAME	CHECK #	CHECK DATE	STATUS	DATE	PAYOUT AMOUNT
ITEM	DESCRIPTION	ITEM NAME		TRANSACTION AMOUNT		
10	**client 2**	**01113**	**02/02/2011**	**Not Reconciled**	**Check - 3 items**	**$16.00**
	test			5.00	12/29/2010	
1	Outright Purchase	Lantern		7.50	03/24/2010	
2	Outright Purchase	T-shirt		1.50	03/24/2010	
3	Outright Purchase	T-shirt		2.00	03/24/2010	
ENTERED BY: admin - admin, admin		TOTAL TRANSACTION AMOUNT		16.00		
		GRAND TOTAL TRANSACTION AMOUNT		$16.00	TOTAL PAYOUTS	$16.00

Related Topics

Selecting the Right Report

SATISFIED OBLIGATIONS REPORT

Inventory Module ➔ *Reports* ➔ *Reports* ➔ *Payouts*

Lists all Payouts, Pay Advances, and Store Credit use by Account

When to Use:

Run this report to view the amounts paid to consignors totaled by account and/or to see payouts and store credit amounts combined.

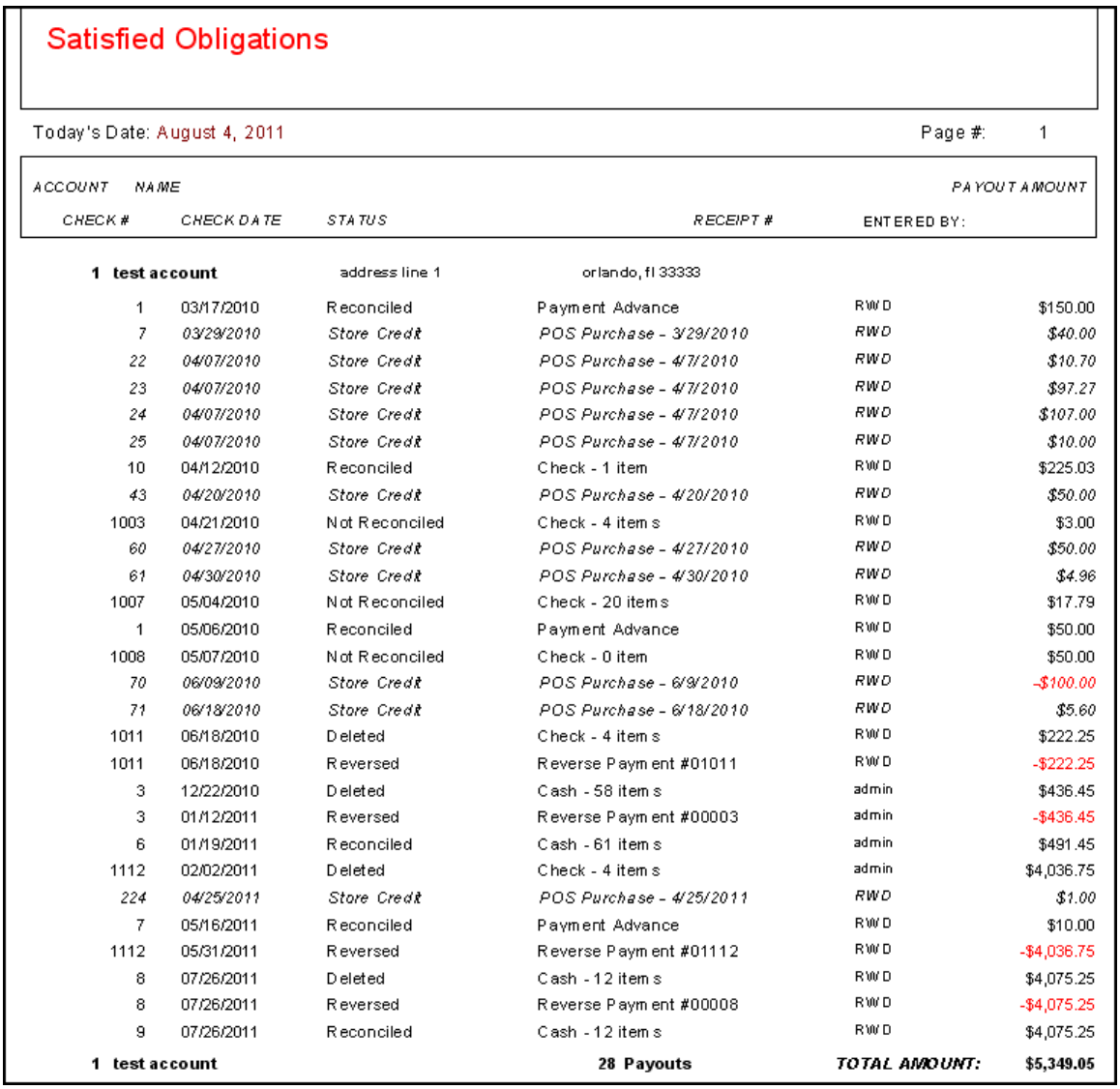
Criteria Choices:

- Account Number
- Check/Payout Number
- Filter Code
- Payment Account
- Payout Date
- Reconcile Status
- Store User
- Total Payouts

Sample Report

To view a sample of the Satisfied Obligations Report, click here.

Copyright 2010, Resaleworld.com, Inc.



Satisfied Obligations

Today's Date: August 4, 2011 Page #: 1

ACCOUNT	NAME				PAYOUT AMOUNT
CHECK #	CHECK DATE	STATUS	RECEIPT #	ENTERED BY:	
1 test account		address line 1	orlando, fl 33333		
1	03/17/2010	Reconciled	Payment Advance	RWD	$150.00
7	*03/29/2010*	*Store Credit*	*POS Purchase - 3/29/2010*	*RWD*	*$40.00*
22	*04/07/2010*	*Store Credit*	*POS Purchase - 4/7/2010*	*RWD*	*$10.70*
23	*04/07/2010*	*Store Credit*	*POS Purchase - 4/7/2010*	*RWD*	*$97.27*
24	*04/07/2010*	*Store Credit*	*POS Purchase - 4/7/2010*	*RWD*	*$107.00*
25	*04/07/2010*	*Store Credit*	*POS Purchase - 4/7/2010*	*RWD*	*$10.00*
10	04/12/2010	Reconciled	Check - 1 item	RWD	$225.03
43	*04/20/2010*	*Store Credit*	*POS Purchase - 4/20/2010*	*RWD*	*$50.00*
1003	04/21/2010	Not Reconciled	Check - 4 items	RWD	$3.00
60	*04/27/2010*	*Store Credit*	*POS Purchase - 4/27/2010*	*RWD*	*$50.00*
61	*04/30/2010*	*Store Credit*	*POS Purchase - 4/30/2010*	*RWD*	*$4.96*
1007	05/04/2010	Not Reconciled	Check - 20 items	RWD	$17.79
1	05/06/2010	Reconciled	Payment Advance	RWD	$50.00
1008	05/07/2010	Not Reconciled	Check - 0 item	RWD	$50.00
70	*06/09/2010*	*Store Credit*	*POS Purchase - 6/9/2010*	*RWD*	*-$100.00*
71	*06/18/2010*	*Store Credit*	*POS Purchase - 6/18/2010*	*RWD*	*$5.60*
1011	06/18/2010	Deleted	Check - 4 items	RWD	$222.25
1011	06/18/2010	Reversed	Reverse Payment #01011	RWD	-$222.25
3	12/22/2010	Deleted	Cash - 58 items	admin	$436.45
3	01/12/2011	Reversed	Reverse Payment #00003	admin	-$436.45
6	01/19/2011	Reconciled	Cash - 61 items	admin	$491.45
1112	02/02/2011	Deleted	Check - 4 items	admin	$4,036.75
224	*04/25/2011*	*Store Credit*	*POS Purchase - 4/25/2011*	*RWD*	*$1.00*
7	05/16/2011	Reconciled	Payment Advance	RWD	$10.00
1112	05/31/2011	Reversed	Reverse Payment #01112	RWD	-$4,036.75
8	07/26/2011	Deleted	Cash - 12 items	RWD	$4,075.25
8	07/26/2011	Reversed	Reverse Payment #00008	RWD	-$4,075.25
9	07/26/2011	Reconciled	Cash - 12 items	RWD	$4,075.25
1 test account			**28 Payouts**	***TOTAL AMOUNT:***	**$5,349.05**

Related Topics

Selecting the Right Report

TRANSACTION DETAIL REPORT

Inventory Module ➔ *Reports* ➔ *Reports* ➔ *Payouts*

Displays all transactions including sales, charges, fees, credits, etc. related to each Account.

When to Use:

Run this report to show a full transaction history for an account or to find specific types of transactions. Unlike the other Payout reports, the Transaction Detail report includes both open and closed transactions.

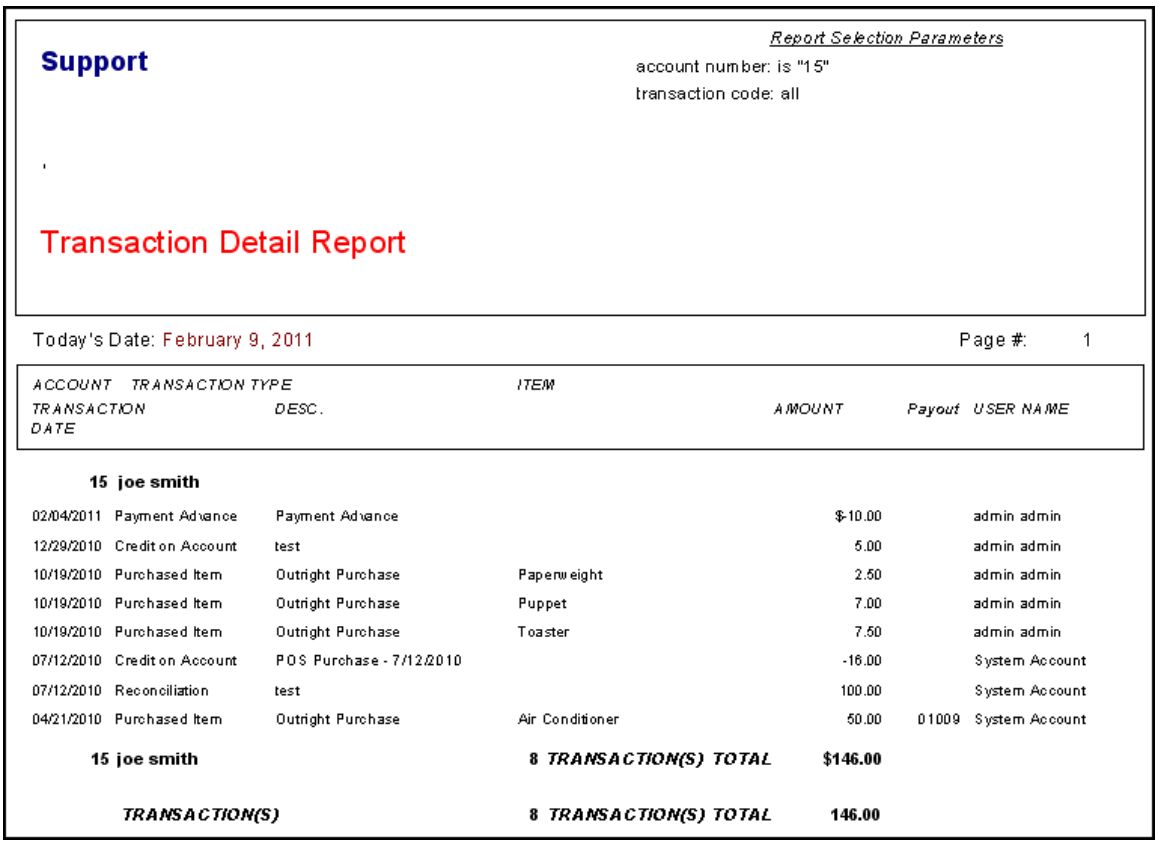
Criteria Choices:

- Account Number
- Transaction Date
- Transaction Code
- Open Transactions
- QB Exported
- Last Name
- Held Transaction?
- Active Account?
- Payout Date

Sample Report

To view a sample of the Transaction Detail Report, click here.

Copyright 2010, Resaleworld.com, Inc.



Support

Report Selection Parameters
account number: is "15"
transaction code: all

Transaction Detail Report

Today's Date: February 9, 2011 Page #: 1

ACCOUNT / TRANSACTION DATE	TRANSACTION TYPE / DESC.	ITEM	AMOUNT	Payout	USER NAME
15 joe smith					
02/04/2011	Payment Advance / Payment Advance		$-10.00		admin admin
12/29/2010	Credit on Account / test		5.00		admin admin
10/19/2010	Purchased Item / Outright Purchase	Paperweight	2.50		admin admin
10/19/2010	Purchased Item / Outright Purchase	Puppet	7.00		admin admin
10/19/2010	Purchased Item / Outright Purchase	Toaster	7.50		admin admin
07/12/2010	Credit on Account / POS Purchase - 7/12/2010		-16.00		System Account
07/12/2010	Reconciliation / test		100.00		System Account
04/21/2010	Purchased Item / Outright Purchase	Air Conditioner	50.00	01009	System Account
15 joe smith		**8 *TRANSACTION(S) TOTAL***	**$146.00**		
TRANSACTION(S)		**8 *TRANSACTION(S) TOTAL***	**146.00**		

Related Topics

Selecting the Right Report

HOURLY SALES REPORT

Inventory Module ➔ *Reports* ➔ *Reports* ➔ *Top "N" and Analysis*

Displays all sales summary information, broken down by hour and day of the week.

Copyright 2010, Resaleworld.com, Inc.

When to Use:

This report can help show the busiest days of the week and busiest times of day, which can be helpful for scheduling.

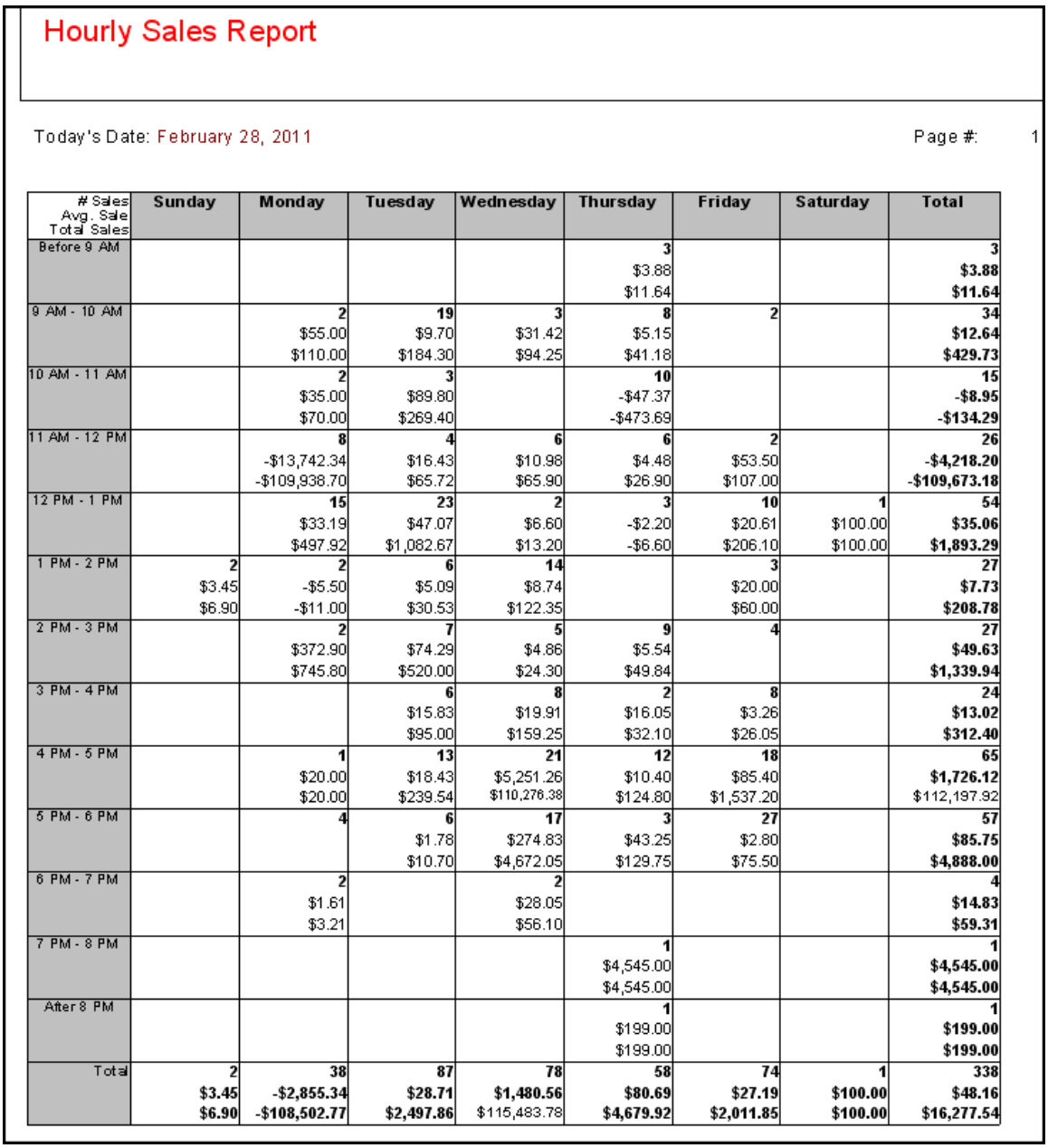
Criteria Choices:

- Sale/Posted Date
- Sales Person
- Sales Status
- Terminal ID

Sample Report

To view a sample of the Hourly Sales Report, click here.

Copyright 2010, Resaleworld.com, Inc.



Hourly Sales Report

Today's Date: February 28, 2011 Page #: 1

# Sales Avg. Sale Total Sales	Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Total
Before 9 AM					3 $3.88 $11.64			3 $3.88 $11.64
9 AM - 10 AM		2 $55.00 $110.00	19 $9.70 $184.30	3 $31.42 $94.25	8 $5.15 $41.18	2		34 $12.64 $429.73
10 AM - 11 AM		2 $35.00 $70.00	3 $89.80 $269.40		10 -$47.37 -$473.69			15 -$8.95 -$134.29
11 AM - 12 PM		8 -$13,742.34 -$109,938.70	4 $16.43 $65.72	6 $10.98 $65.90	6 $4.48 $26.90	2 $53.50 $107.00		26 -$4,218.20 -$109,673.18
12 PM - 1 PM		15 $33.19 $497.92	23 $47.07 $1,082.67	2 $6.60 $13.20	3 -$2.20 -$6.60	10 $20.61 $206.10	1 $100.00 $100.00	54 $35.06 $1,893.29
1 PM - 2 PM	2 $3.45 $6.90	2 -$5.50 -$11.00	6 $5.09 $30.53	14 $8.74 $122.35		3 $20.00 $60.00		27 $7.73 $208.78
2 PM - 3 PM		2 $372.90 $745.80	7 $74.29 $520.00	5 $4.86 $24.30	9 $5.54 $49.84	4		27 $49.63 $1,339.94
3 PM - 4 PM			6 $15.83 $95.00	8 $19.91 $159.25	2 $16.05 $32.10	8 $3.26 $26.05		24 $13.02 $312.40
4 PM - 5 PM		1 $20.00 $20.00	13 $18.43 $239.54	21 $5,251.26 $110,276.38	12 $10.40 $124.80	18 $85.40 $1,537.20		65 $1,726.12 $112,197.92
5 PM - 6 PM		4	6 $1.78 $10.70	17 $274.83 $4,672.05	3 $43.25 $129.75	27 $2.80 $75.50		57 $85.75 $4,888.00
6 PM - 7 PM		2 $1.61 $3.21		2 $28.05 $56.10				4 $14.83 $59.31
7 PM - 8 PM					1 $4,545.00 $4,545.00			1 $4,545.00 $4,545.00
After 8 PM					1 $199.00 $199.00			1 $199.00 $199.00
Total	2 $3.45 $6.90	38 -$2,855.34 -$108,502.77	87 $28.71 $2,497.86	78 $1,480.56 $115,483.78	58 $80.69 $4,679.92	74 $27.19 $2,011.85	1 $100.00 $100.00	338 $48.16 $16,277.54

Related Topics

Selecting the Right Report

CATEGORY/BRAND ANALYSIS REPORT

Inventory Module ➔ *Reports* ➔ *Reports* ➔ *Top "N" and Analysis*

This cross-tab report organizes sales by both category and brand. The grid shows sales summary information (number of sales, average sale, and total sales) for each combination of category and brand.

When to Use:

Run this report to see which brands are selling the best across a specific set of categories.

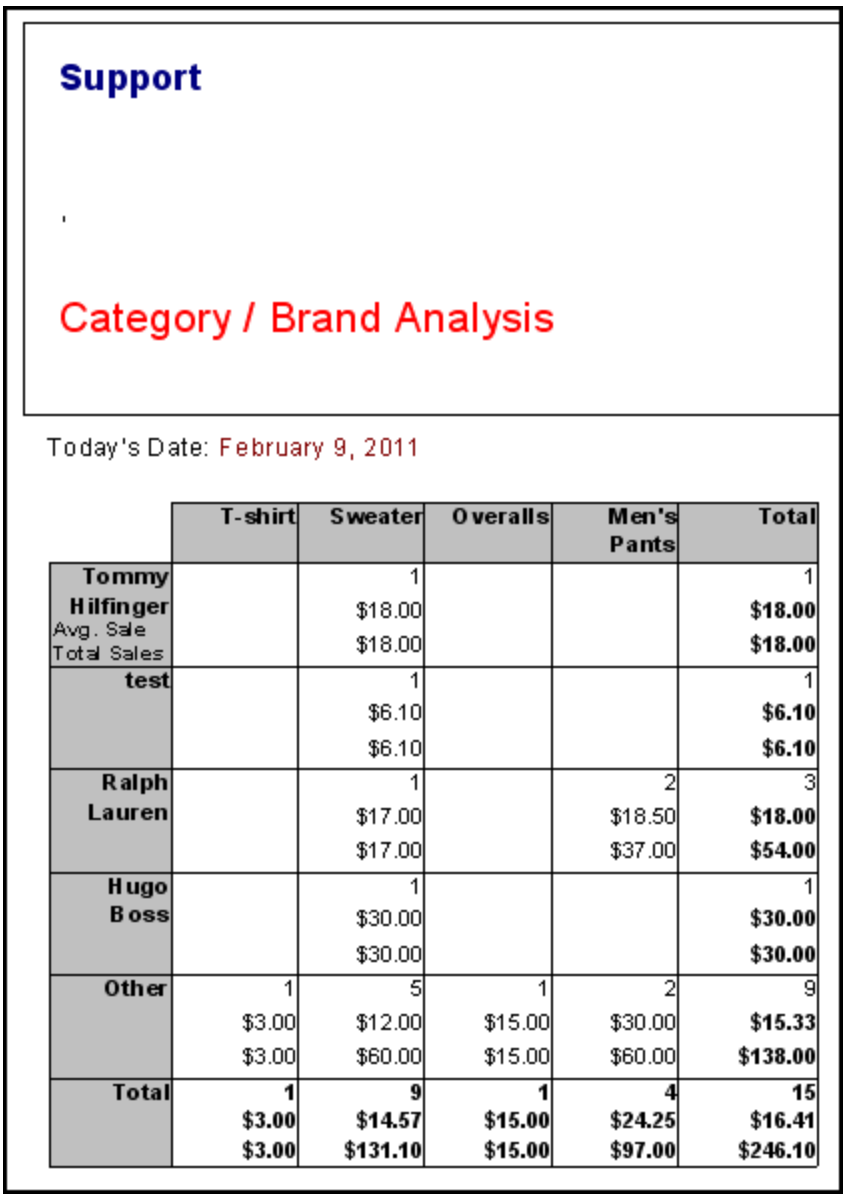
Criteria Choices:

- Category 1
- Category 2
- Category 3
- Brand
- Color
- Size
- Date Sold/Posted
- Account Number
- Filter Code
- Item Received Date
- Price Code

Sample Report

To view a sample of the Category/Brand Analysis Report, click here.

Copyright 2010, Resaleworld.com, Inc.



Support

'

Category / Brand Analysis

Today's Date: February 9, 2011

	T-shirt	Sweater	Overalls	Men's Pants	Total
Tommy Hilfinger Avg. Sale Total Sales		1 $18.00 $18.00			1 **$18.00** **$18.00**
test		1 $6.10 $6.10			1 **$6.10** **$6.10**
Ralph Lauren		1 $17.00 $17.00		2 $18.50 $37.00	3 **$18.00** **$54.00**
Hugo Boss		1 $30.00 $30.00			1 **$30.00** **$30.00**
Other	1 $3.00 $3.00	5 $12.00 $60.00	1 $15.00 $15.00	2 $30.00 $60.00	9 **$15.33** **$138.00**
Total	**1** **$3.00** **$3.00**	**9** **$14.57** **$131.10**	**1** **$15.00** **$15.00**	**4** **$24.25** **$97.00**	**15** **$16.41** **$246.10**

Related Topics

Selecting the Right Report

CATEGORY/COLOR ANALYSIS REPORT

Inventory Module ➔ *Reports* ➔ *Reports* ➔ *Top "N" and Analysis*

This cross-tab report organizes sales by both category and color. The grid shows sales summary information (number of sales, average sale, and total sales) for each combination of category and color.

When to Use:

Run this report to see which colors are selling the best across a specific set of categories.

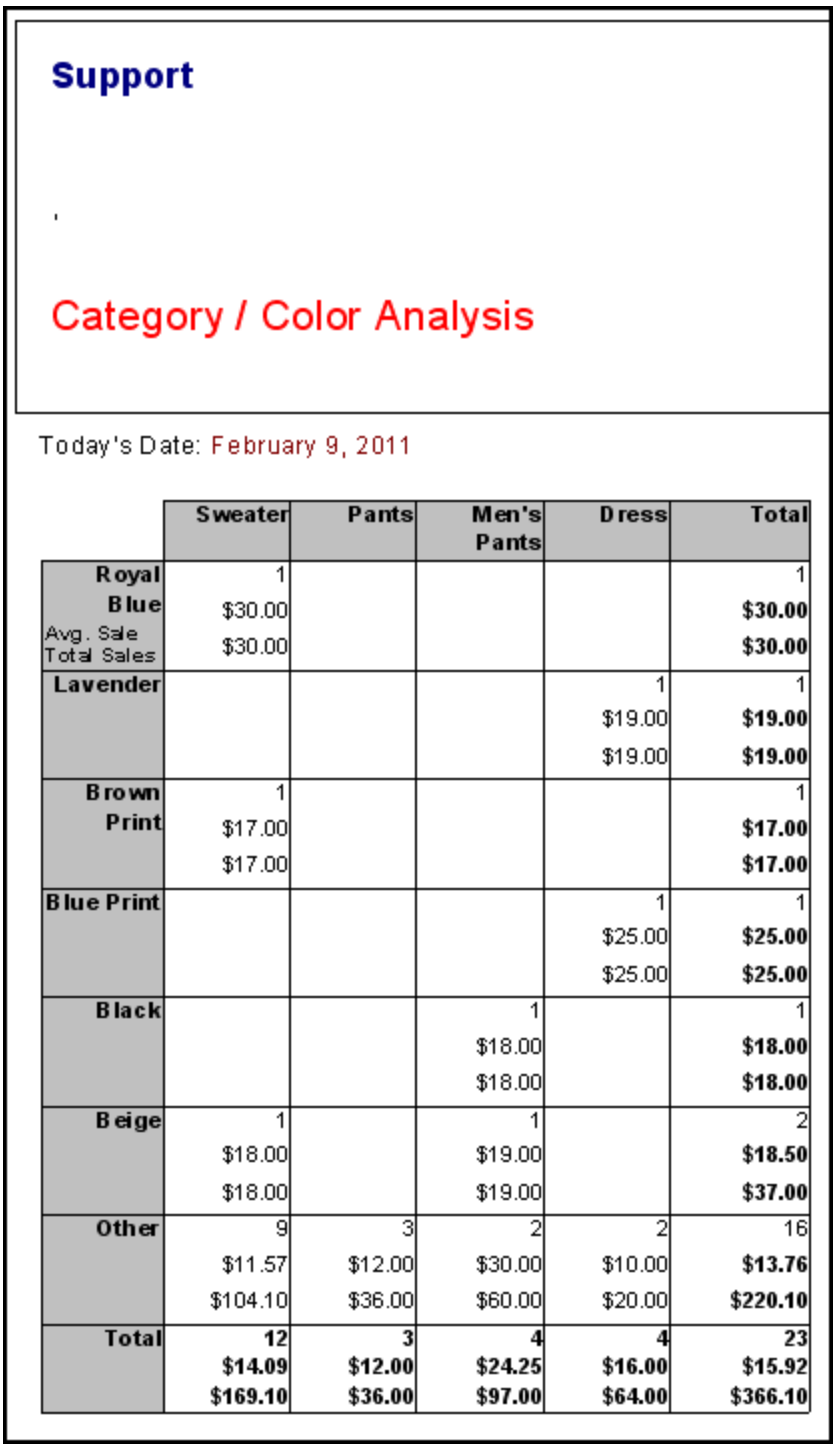
Criteria Choices:

- Category 1
- Category 2
- Category 3
- Brand
- Color
- Size
- Date Sold/Posted
- Account Number
- Filter Code
- Item Received Date
- Price Code

Sample Report

To view a sample of the Category/Color Analysis Report, click here.

Copyright 2010, Resaleworld.com, Inc.



Support

'

Category / Color Analysis

Today's Date: February 9, 2011

	Sweater	Pants	Men's Pants	Dress	Total
Royal Blue	1				1
Avg. Sale	$30.00				**$30.00**
Total Sales	$30.00				**$30.00**
Lavender				1	1
				$19.00	**$19.00**
				$19.00	**$19.00**
Brown Print	1				1
	$17.00				**$17.00**
	$17.00				**$17.00**
Blue Print				1	1
				$25.00	**$25.00**
				$25.00	**$25.00**
Black			1		1
			$18.00		**$18.00**
			$18.00		**$18.00**
Beige	1		1		2
	$18.00		$19.00		**$18.50**
	$18.00		$19.00		**$37.00**
Other	9	3	2	2	16
	$11.57	$12.00	$30.00	$10.00	**$13.76**
	$104.10	$36.00	$60.00	$20.00	**$220.10**
Total	**12**	**3**	**4**	**4**	**23**
	$14.09	**$12.00**	**$24.25**	**$16.00**	**$15.92**
	$169.10	**$36.00**	**$97.00**	**$64.00**	**$366.10**

Related Topics

Selecting the Right Report

Copyright 2010, Resaleworld.com, Inc.

CATEGORY/SIZE ANALYSIS REPORT

Inventory Module ➔ *Reports* ➔ *Reports* ➔ *Top "N" and Analysis*

This cross-tab report organizes sales by both category and size. The grid shows sales summary information (number of sales, average sale, and total sales) for each combination of category and size.

When to Use:

Run this report to see which sizes are selling the best across a specific set of categories.

Criteria Choices:

- Category 1
- Category 2
- Category 3
- Brand
- Color
- Size
- Date Sold/Posted
- Account Number
- Filter Code
- Item Received Date
- Price Code

Sample Report

To view a sample of the Category/Size Analysis Report, click here.

Copyright 2010, Resaleworld.com, Inc.

Support

size: all
category 1
date sold/
category 3

Category / Size Analysis

Today's Date: February 9, 2011

	Sweater	Pants Suit	Pants	Overalls	Dress	Total
XS				1		1
Avg. Sale				$5.00		**$5.00**
Total Sales				$5.00		**$5.00**
XL	1					1
	$15.00					**$15.00**
	$15.00					**$15.00**
S	1			1		2
	$13.00			$7.50		**$10.25**
	$13.00			$7.50		**$20.50**
M	2		2			4
	$10.00		$13.00			**$11.50**
	$20.00		$26.00			**$46.00**
Large		1				1
		$11.50				**$11.50**
		$11.50				**$11.50**
L	3		1			4
	$13.33		$10.00			**$12.50**
	$40.00		$10.00			**$50.00**
4XL	1					1
	$10.00					**$10.00**
	$10.00					**$10.00**
10P					1	1
					$10.00	**$10.00**
					$10.00	**$10.00**
10					1	1
					$10.00	**$10.00**
					$10.00	**$10.00**
Other	4			1	2	7
	$17.78			$15.00	$22.00	**$18.59**
	$71.10			$15.00	$44.00	**$130.10**
Total	**12**	**1**	**3**	**3**	**4**	**23**
	$14.09	**$11.50**	**$12.00**	**$9.17**	**$16.00**	**$13.40**
	$169.10	**$11.50**	**$36.00**	**$27.50**	**$64.00**	**$308.10**

Related Topics

Copyright 2010, Resaleworld.com, Inc.

Selecting the Right Report

HISTORICAL INVENTORY AND OBLIGATION REPORT

Inventory Module ➔ *Reports* ➔ *Reports* ➔ *Top "N" and Analysis*

This report calculates the estimated Inventory and Obligation totals as of a previous date, based on inventory, sales, and order records. While Liberty does not maintain any sort of historical "snapshots", this report performs a series of calculations that reconstruct these totals.

When to Use:

Useful when trying to obtain totals as of an earlier date, such as the end of the previous year.

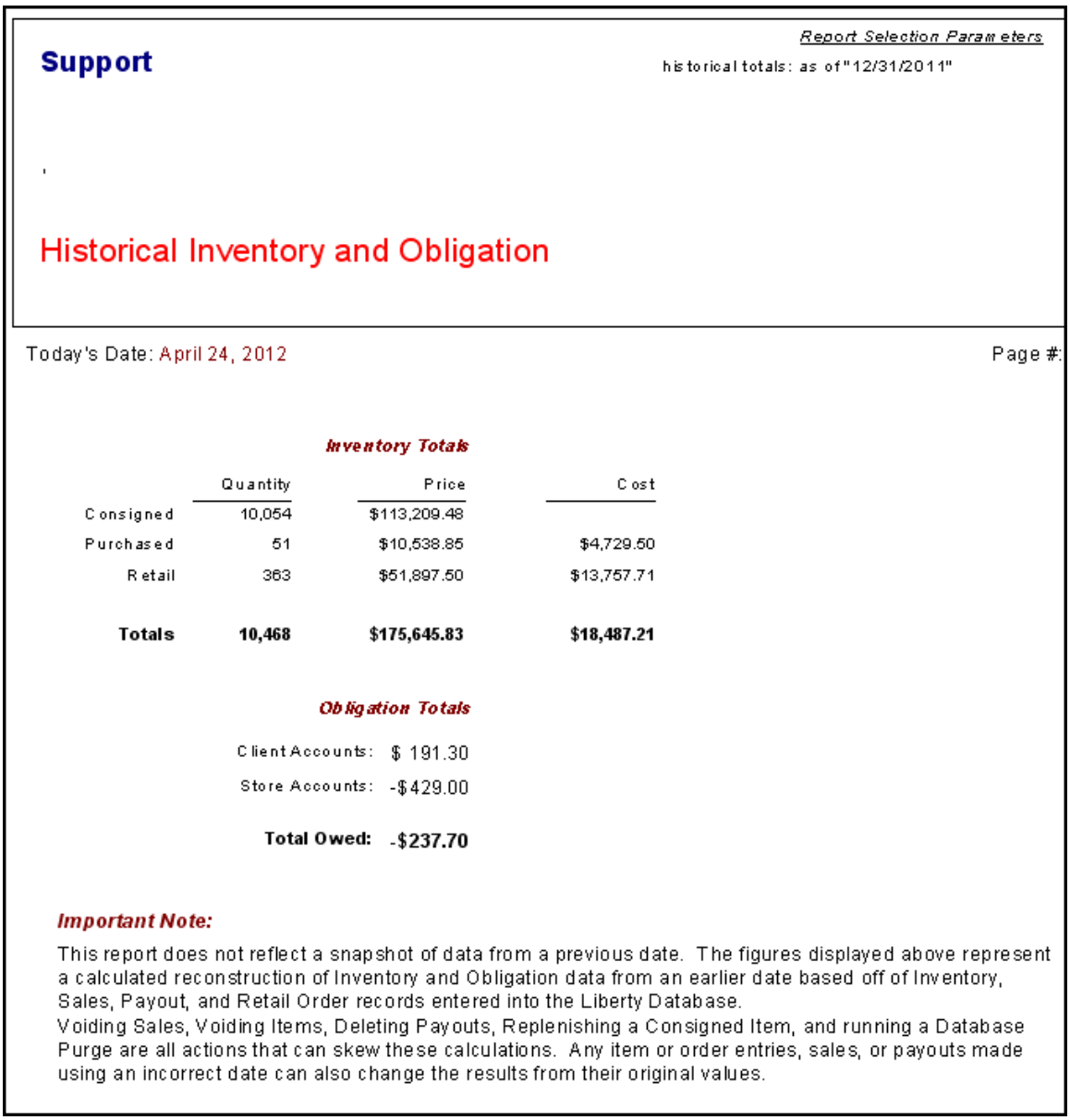
Criteria Choices:

- Historical Totals
- Account Type

Sample Report

To view a sample of the Historical Inventory and Obligation Report, click here.

Copyright 2010, Resaleworld.com, Inc.



Support

Report Selection Parameters

historical totals: as of "12/31/2011"

Historical Inventory and Obligation

Today's Date: April 24, 2012 Page #:

Inventory Totals

	Quantity	Price	Cost
Consigned	10,054	$113,209.48	
Purchased	51	$10,538.85	$4,729.50
Retail	363	$51,897.50	$13,757.71
Totals	**10,468**	**$175,645.83**	**$18,487.21**

Obligation Totals

Client Accounts:	$ 191.30
Store Accounts:	-$429.00
Total Owed:	**-$237.70**

Important Note:

This report does not reflect a snapshot of data from a previous date. The figures displayed above represent a calculated reconstruction of Inventory and Obligation data from an earlier date based off of Inventory, Sales, Payout, and Retail Order records entered into the Liberty Database.
Voiding Sales, Voiding Items, Deleting Payouts, Replenishing a Consigned Item, and running a Database Purge are all actions that can skew these calculations. Any item or order entries, sales, or payouts made using an incorrect date can also change the results from their original values.

Related Topics

Selecting the Right Report

PROMOTION SUMMARY REPORT

Inventory Module → Reports → Reports → Top "N" and Analysis

Displays a summary of sales figures from receipts where a Promotion was selected in PoS.

When to Use:

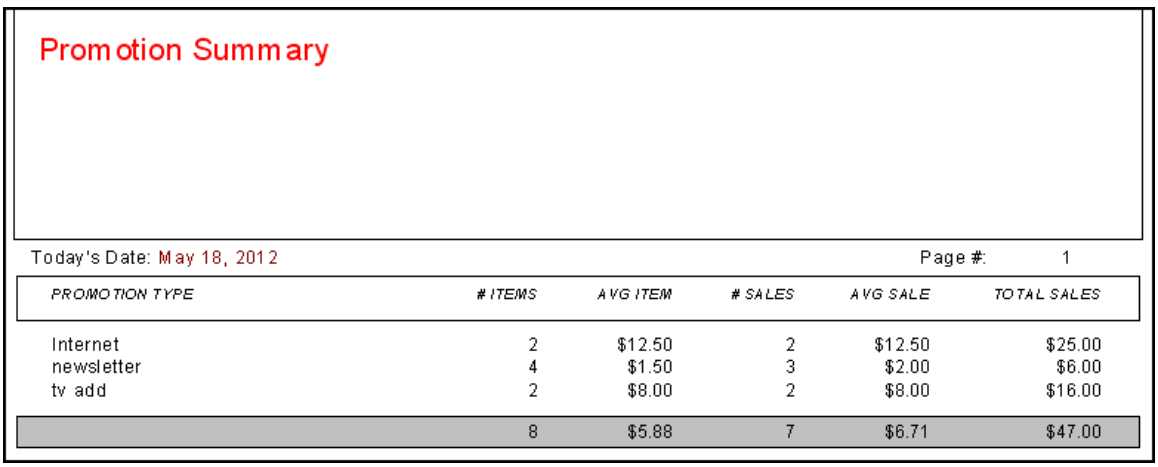
Run this report to see the number of items, number of sales, Average Item Price, Average Sale Amount, and Sales Totals for various sales promotions. .

Criteria Choices:

- Date Sold/Posted
- Promotion Type
- Category 1
- Category 2
- Category 3

Sample Report

To view a sample of the Promotion Summary Report, click here.



Promotion Summary

Today's Date: May 18, 2012 Page #: 1

PROMOTION TYPE	# ITEMS	AVG ITEM	# SALES	AVG SALE	TOTAL SALES
Internet	2	$12.50	2	$12.50	$25.00
newsletter	4	$1.50	3	$2.00	$6.00
tv add	2	$8.00	2	$8.00	$16.00
	8	$5.88	7	$6.71	$47.00

Related Topics

Selecting the Right Report

TOP SELLING BRANDS REPORT

Inventory Module → Reports → Reports → Top "N" and Analysis

This report gives you a visual representation of the top selling brands by total price sold for a given time period.

When to Use:

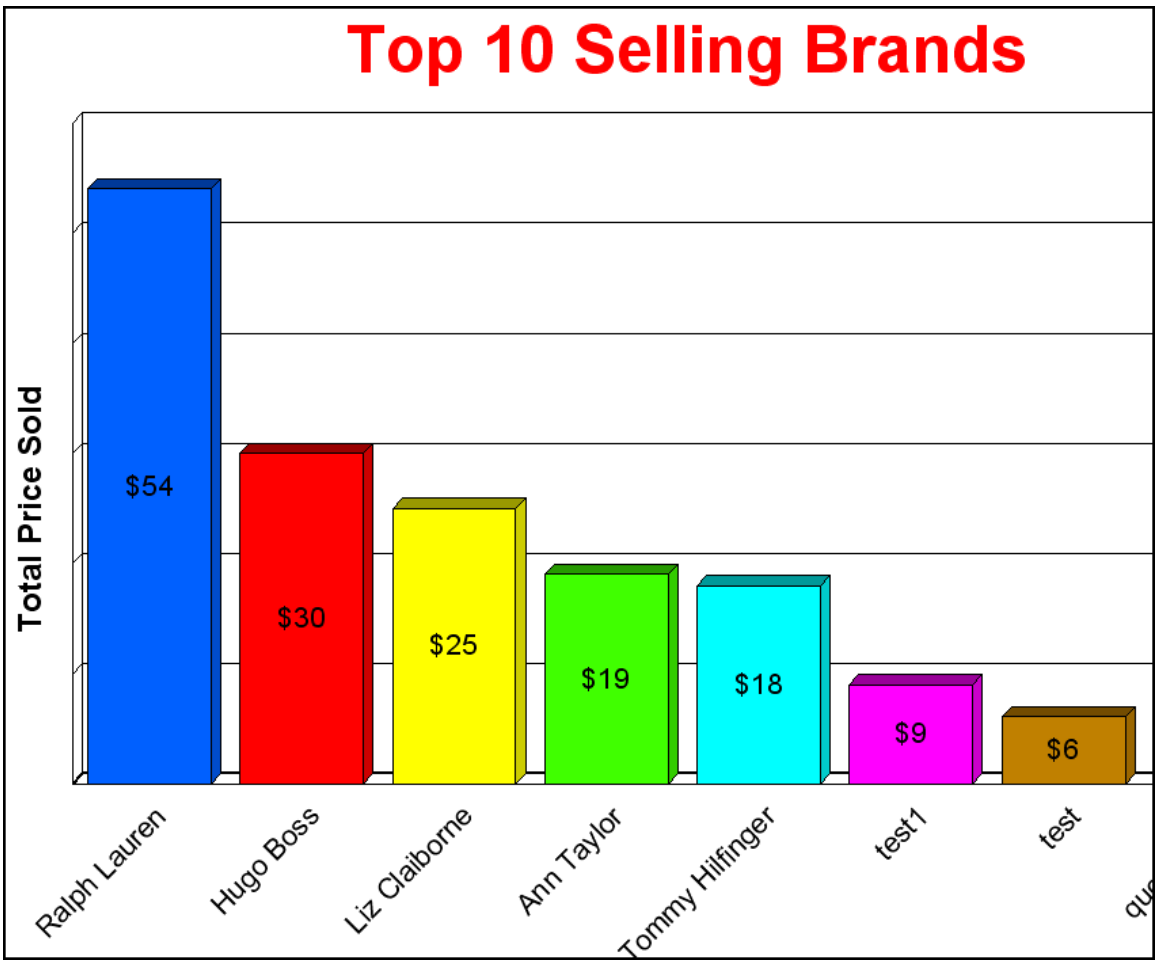
Run to see your top selling brands overall or for a specific set of categories.

Criteria Choices:

- Date Sold/Posted
- Brand
- Category 1
- Category 2
- Category 3

Sample Report

To view a sample of the Top Selling Brands Report, click here.



Related Topics

Selecting the Right Report

TOP SELLING CATEGORIES (GRAPH) REPORT

Inventory Module → Reports → Reports → Top "N" and Analysis

Copyright 2010, Resaleworld.com, Inc.

This chart is a visual representation of the top selling categories.

> *Note: This report can only display results from the store's top 25 selling categories for the time period selected.*

When to Use:

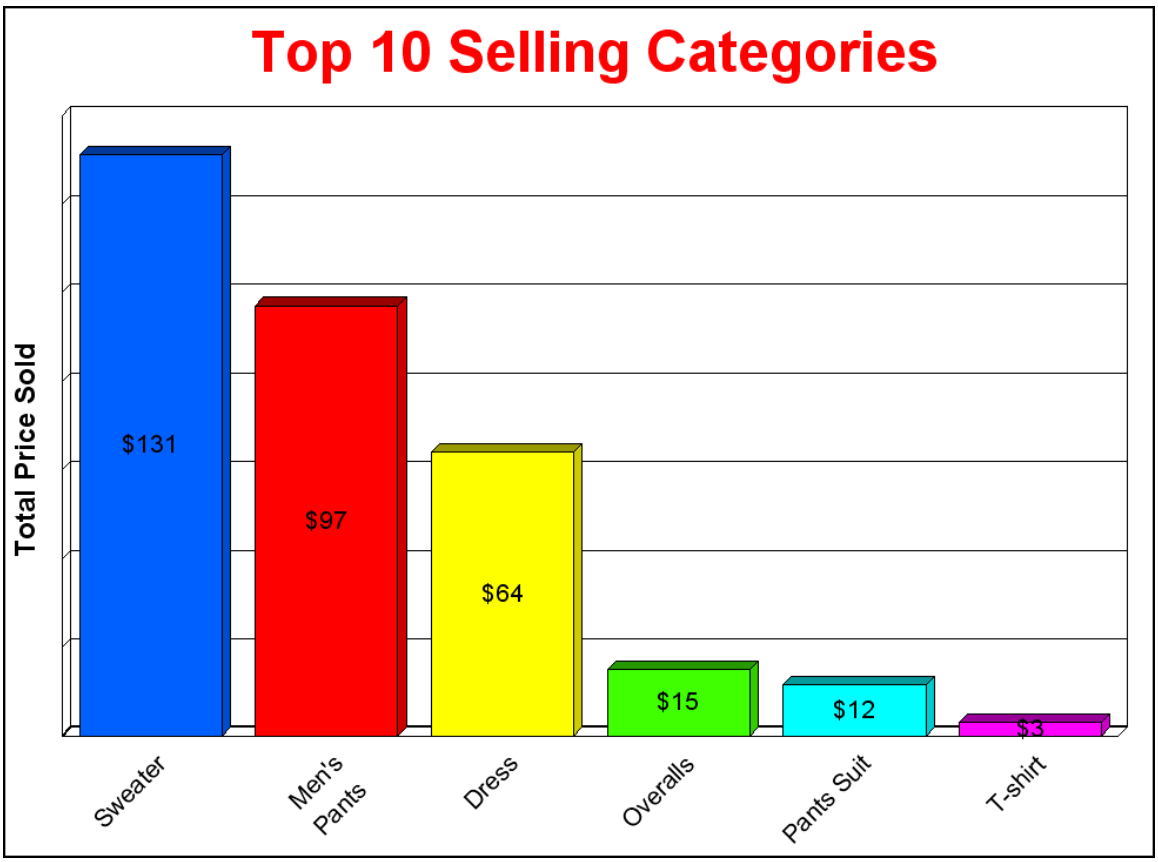
Run to see your top selling categories (by total price sold) over a given time frame.

Criteria Choices:

- Date Sold/Posted
- Category 1
- Category 2
- Category 3

Sample Report

To view a sample of the Top Selling Categories Report, click here.



Related Topics

Selecting the Right Report

TOP SELLING SIZES (GRAPH) REPORT

Inventory Module → *Reports* → *Reports* → *Top "N" and Analysis*

This report gives you a visual representation of the best selling "sizes" for a particular time period.

When to Use:

Run to see your top selling sizes overall or for a specific group of categories.

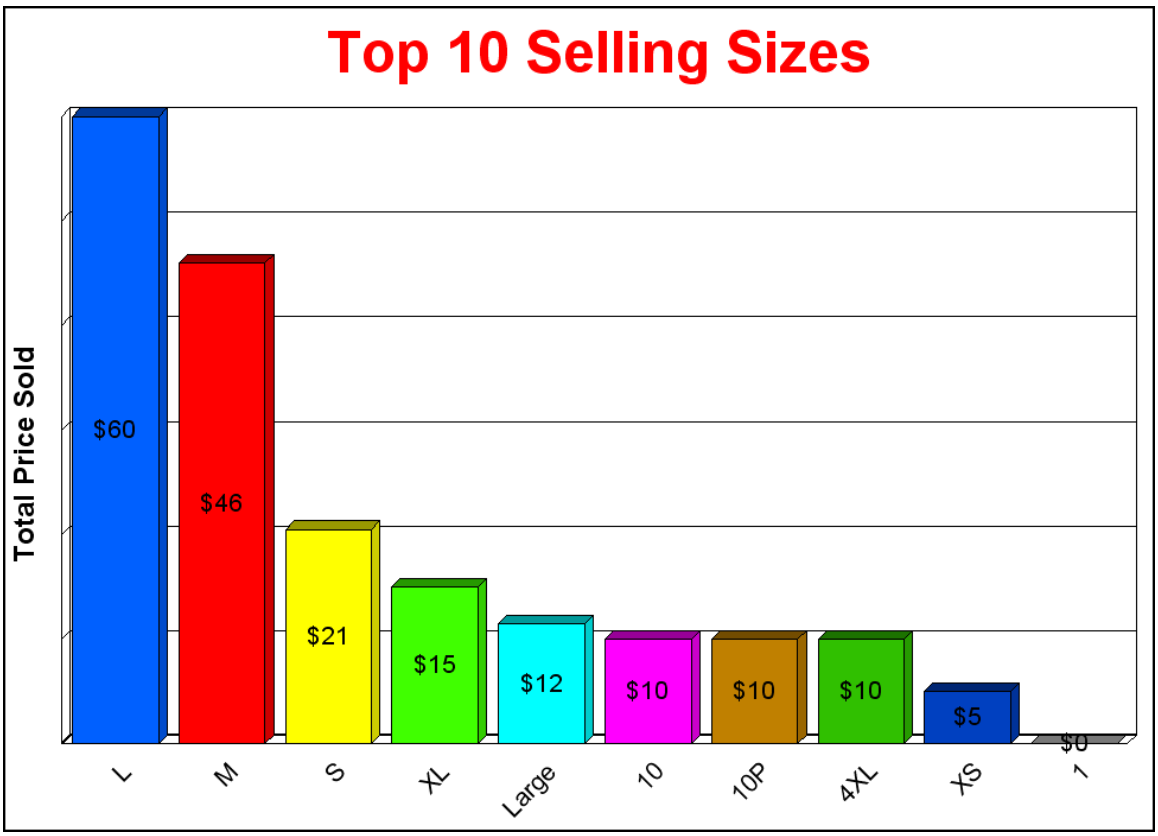
Criteria Choices:

- Category 1
- Category 2
- Category 3
- Date Sold/Posted

Sample Report

To view a sample of the Top Selling Sizes Report, click here.

Copyright 2010, Resaleworld.com, Inc.



Related Topics

Selecting the Right Report

TOP SLOWEST SELLING CATEGORIES REPORT

Inventory Module → *Reports* → *Reports* → *Top "N" and Analysis*

Displays a graph of the average number of days to sell for up to ten categories.

Note: This report is based on items that have sold. Unsold items, regardless of time in store, do not affect this report.

When to Use:

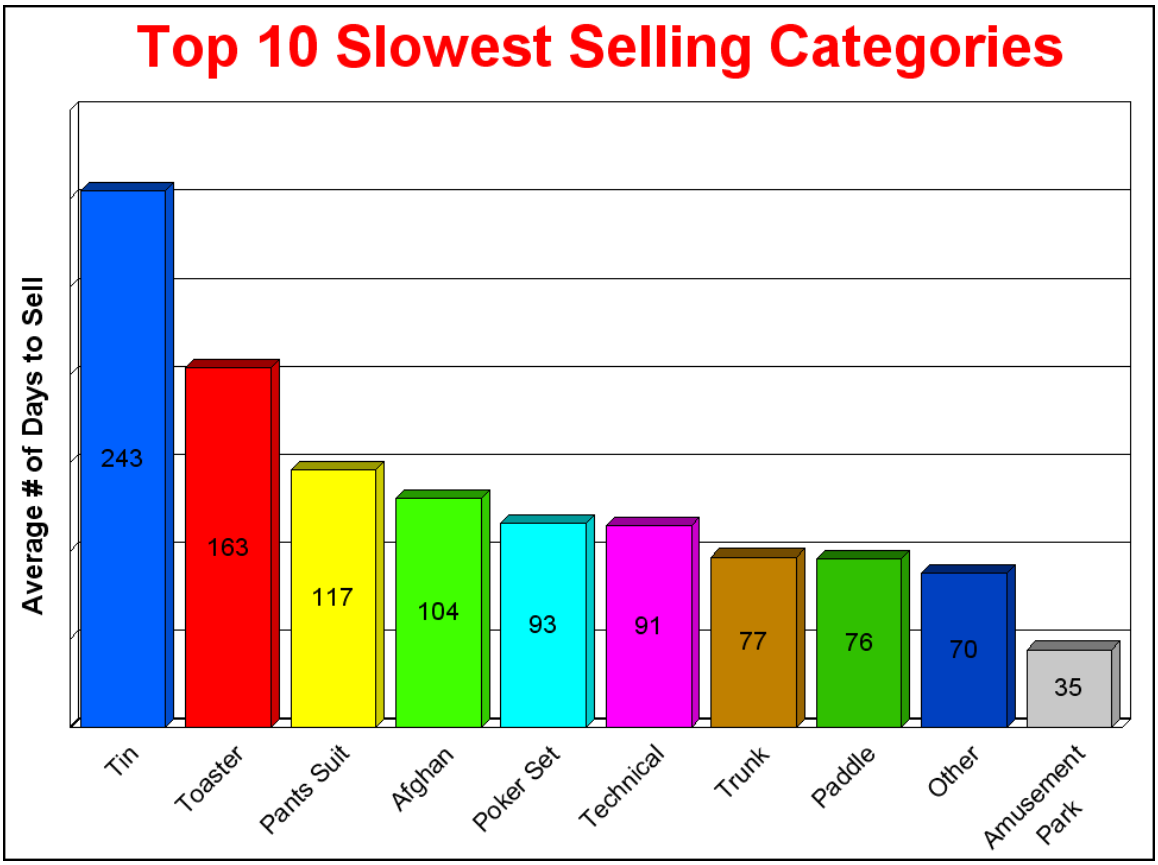
Run this report to find categories that are not selling as well as others.

Criteria Choices:

- Category 1
- Category 2
- Category 3
- Date Sold/Posted

Sample Report

To view a sample of the Top Slowest Selling Categories Report, click here.



Related Topics

Selecting the Right Report

WEEKLY SALES ANALYSIS REPORT

Inventory Module ➔ *Reports* ➔ *Reports* ➔ *Top "N" and Analysis*

Displays sales summary information, broken down by both week and day of week.

When to Use:

This report provides a great way to compare sales for multiple weeks side-by-side, or for a specific day of the week across several weeks.

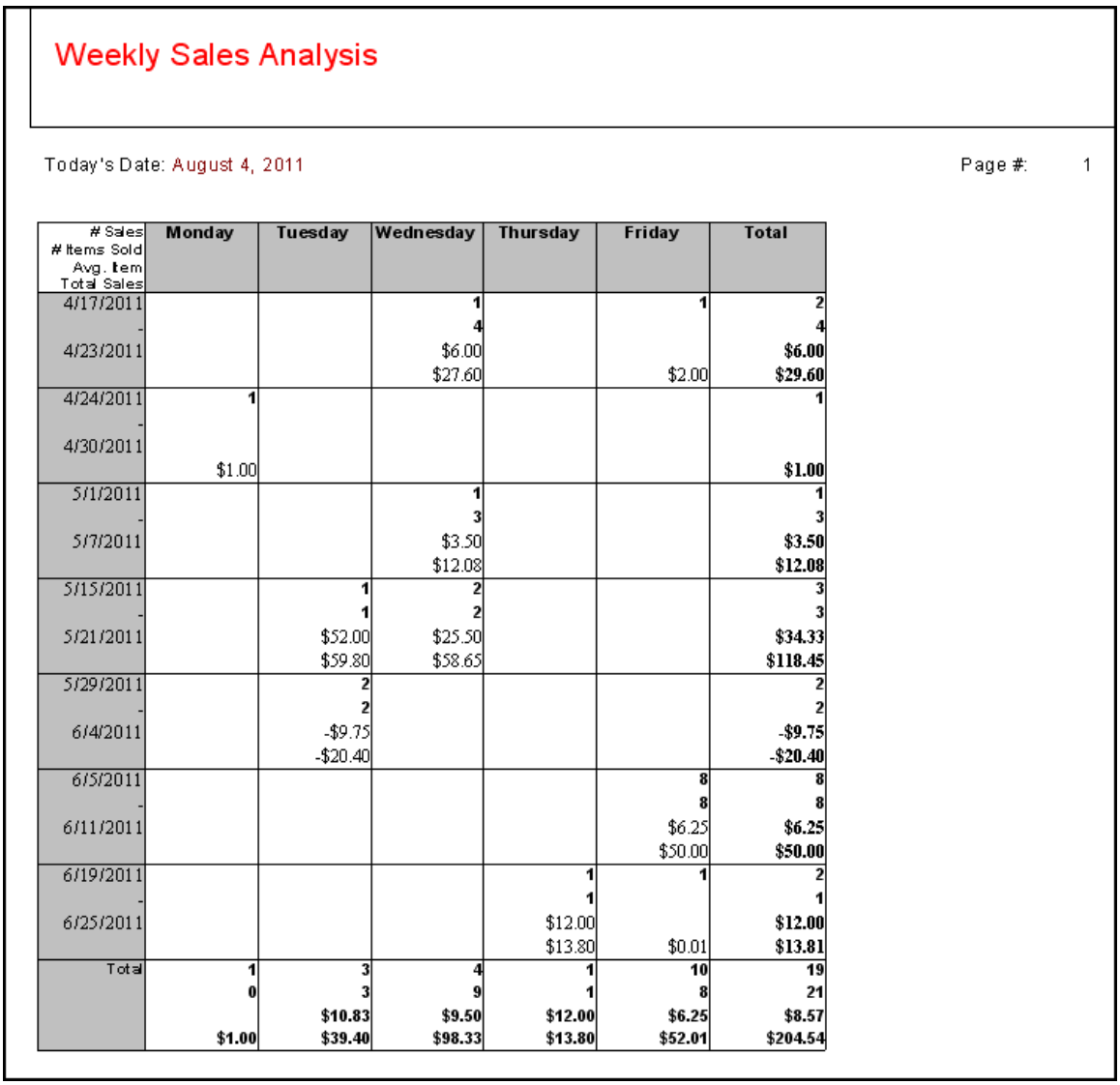
Criteria Choices:

- Sale/Posted Date
- Sales Person
- Sales Status
- Terminal ID

Sample Report

To view a sample of the Weekly Sales Analysis Report, click here.

Copyright 2010, Resaleworld.com, Inc.



Weekly Sales Analysis

Today's Date: August 4, 2011 Page #: 1

# Sales # Items Sold Avg. Item Total Sales	Monday	Tuesday	Wednesday	Thursday	Friday	Total
4/17/2011 - 4/23/2011			1 4 $6.00 $27.60		1 $2.00	2 4 $6.00 $29.60
4/24/2011 - 4/30/2011	1 $1.00					1 $1.00
5/1/2011 - 5/7/2011			1 3 $3.50 $12.08			1 3 $3.50 $12.08
5/15/2011 - 5/21/2011		1 1 $52.00 $59.80	2 2 $25.50 $58.65			3 3 $34.33 $118.45
5/29/2011 - 6/4/2011		2 2 -$9.75 -$20.40				2 2 -$9.75 -$20.40
6/5/2011 - 6/11/2011					8 8 $6.25 $50.00	8 8 $6.25 $50.00
6/19/2011 - 6/25/2011				1 1 $12.00 $13.80	1 $0.01	2 1 $12.00 $13.81
Total	1 0 $1.00	3 3 $10.83 $39.40	4 9 $9.50 $98.33	1 1 $12.00 $13.80	10 8 $6.25 $52.01	19 21 $8.57 $204.54

Related Topics

Selecting the Right Report

ACCOUNT COMMENTS REPORT

Inventory Module → *Reports* → *Reports* → *Accounts*

Displays all comments related to each account.

When to Use:

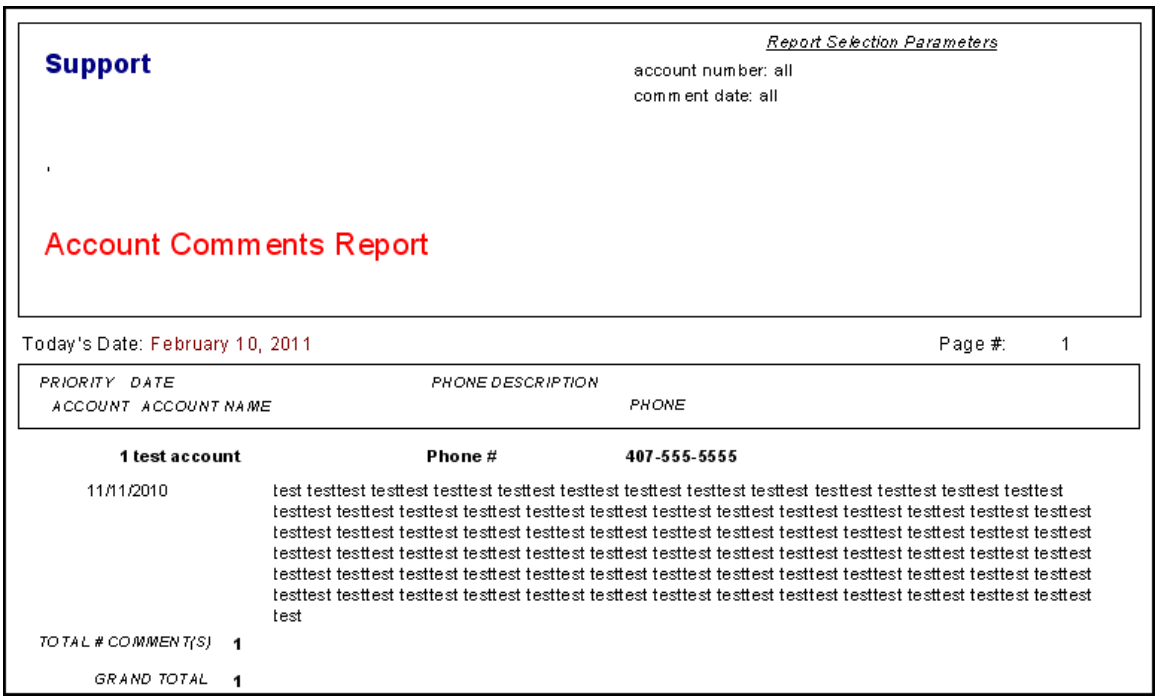
Run this report to locate a note or comment that has been entered in to an account.

Criteria Choices:

- Account Number
- Active Account?
- Comment Date
- Comment Keyword
- Priority

Sample Report

To view a sample of the Account Comments Report, click here.



Support

Report Selection Parameters
account number: all
comment date: all

Account Comments Report

Today's Date: February 10, 2011 Page #: 1

PRIORITY	DATE	ACCOUNT	ACCOUNT NAME	PHONE DESCRIPTION	PHONE
1 test account				**Phone #**	**407-555-5555**
	11/11/2010		test testtest testtest testtest

Account Export by Purchases Report

Inventory Module → *Reports* → *Reports* → *Accounts*

Displays basic account information, including the total value of items purchased. This report is formatted specifically for exporting to a CSV or Excel file.

When to Use:

Run this report to pull basic account contact information in a format that can be exported to a file and then imported into another program such as Microsoft Outlook or Constant Contacts. This report shows (and can be filtered by) total item purchases by the account.

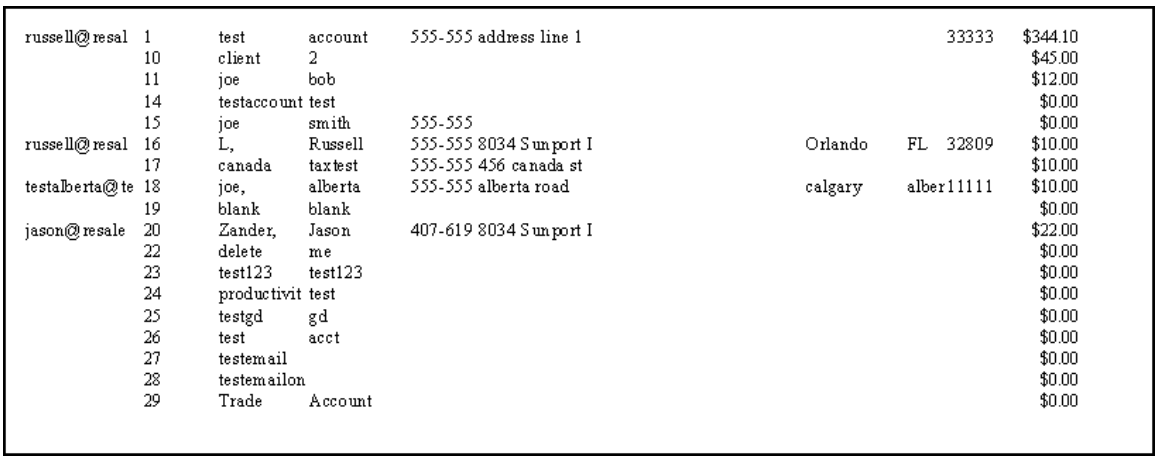
Criteria Choices:

- Account Number
- Active Account?
- Birth Month
- Client Rating
- Filter Code
- Has Email Address
- Last Date Item Added
- Last Purchase Date
- Total Purchases
- Date Sold/Posted
- User Field (1 – 15)

Sample Report

To view a sample of the Account Export by Purchases Report, click here.

Copyright 2010, Resaleworld.com, Inc.



russell@resal	1	test	account	555-555 address line 1			33333	$344.10
	10	client	2					$45.00
	11	joe	bob					$12.00
	14	testaccount	test					$0.00
	15	joe	smith	555-555				$0.00
russell@resal	16	L,	Russell	555-555 8034 Sunport I	Orlando	FL	32809	$10.00
	17	canada	taxtest	555-555 456 canada st				$10.00
testalberta@te	18	joe,	alberta	555-555 alberta road	calgary	alber	11111	$10.00
	19	blank	blank					$0.00
jason@resale	20	Zander,	Jason	407-619 8034 Sunport I				$22.00
	22	delete	me					$0.00
	23	test123	test123					$0.00
	24	productivit	test					$0.00
	25	testgd	gd					$0.00
	26	test	acct					$0.00
	27	testemail						$0.00
	28	testemailon						$0.00
	29	Trade	Account					$0.00

Related Topics

Selecting the Right Report

ACCOUNT LIST REPORT

Inventory Module → *Reports* → *Reports* → *Accounts*

Displays available information for each account including address and phone number.

> *Note: Information for each account appears on a single line, making this report much shorter than the Account List - Full Detail Report.*

When to Use:

Run this report to view basic account info, such as street address, e-mail address, and phone number.

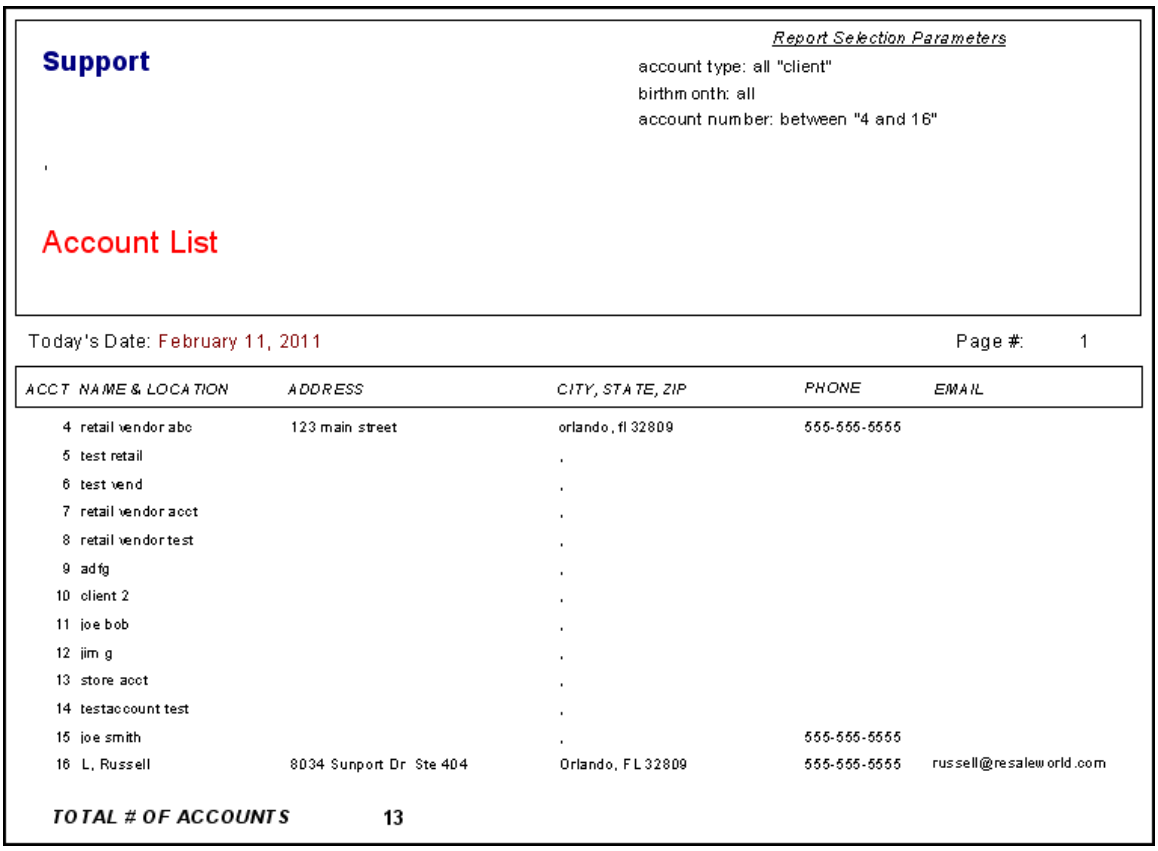
Copyright 2010, Resaleworld.com, Inc.

Criteria Choices:

- Account Number
- Account Type
- Birth Month
- Added By
- City
- State
- Zip Code
- Date Added
- Display which accounts?
- Donate Allowed
- Filter Code
- Last Date Modified
- Active Account?
- Last Transaction Date
- Last Purchase Date

Sample Report

To view a sample of the Account List Report, click here.



Support

Report Selection Parameters
account type: all "client"
birthm onth: all
account number: between "4 and 16"

'

Account List

Today's Date: February 11, 2011 Page #: 1

ACCT	NAME & LOCATION	ADDRESS	CITY, STATE, ZIP	PHONE	EMAIL
4	retail vendor abc	123 main street	orlando, fl 32809	555-555-5555	
5	test retail		,		
6	test vend		,		
7	retail vendor acct		,		
8	retail vendor test		,		
9	adfg		,		
10	client 2		,		
11	joe bob		,		
12	jim g		,		
13	store acct		,		
14	testaccount test		,		
15	joe smith		,	555-555-5555	
16	L, Russell	8034 Sunport Dr Ste 404	Orlando, FL 32809	555-555-5555	russell@resaleworld.com

TOTAL # OF ACCOUNTS 13

Related Topics

Selecting the Right Report

ACCOUNT LIST - FULL DETAIL REPORT

Inventory Module → *Reports* → *Reports* → *Accounts*

Displays account information, including primary address, phone number, e-mail address and company name.

> *Note: This is a lengthy report - the Account List Report contains less information, resulting in a much shorter report.*

When to Use:

Run this report for detailed information about certain accounts, including all phone and e-mail entries.

Criteria Choices:

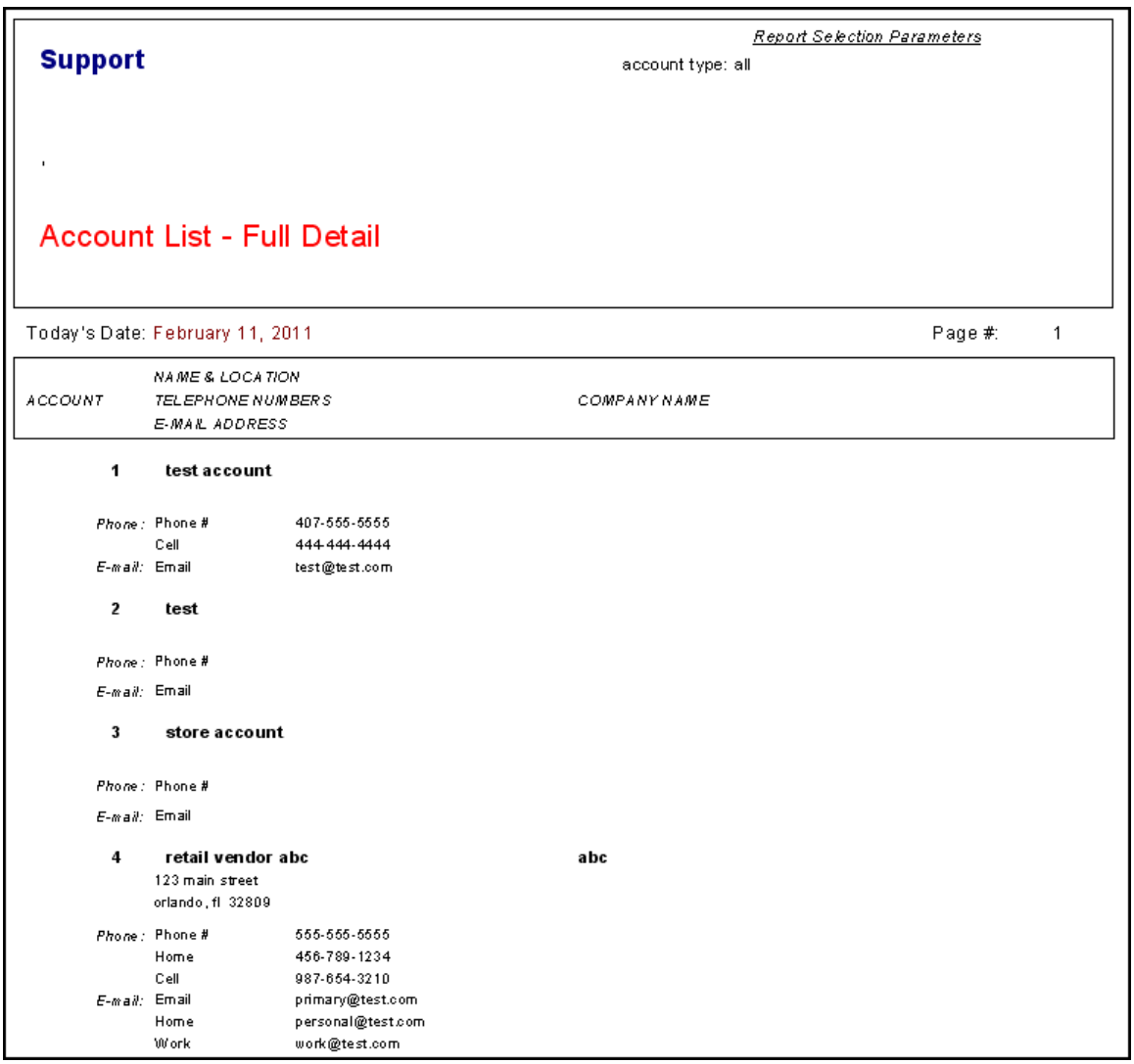
- Account Number
- Account Type
- Active Account?
- Birthmonth
- Added By
- City
- State
- Zip Code
- Date Added
- Display which accounts?
- Filter Code
- Last Date Modified
- Last Transaction Date

Copyright 2010, Resaleworld.com, Inc.

- Last Purchase Date
- Preferred Price Code
- Payment Account
- Default Marketplace
- Default Purchase Method
- Receive Marketing Email
- Receive Email
- Receive Mail
- Allow Donate
- Has Email Address
- Upload Account Info

Sample Report

To view a sample of the Account List - Full Detail Report, click here.



Support

Report Selection Parameters
account type: all

'

Account List - Full Detail

Today's Date: February 11, 2011 Page #: 1

ACCOUNT	NAME & LOCATION TELEPHONE NUMBERS E-MAIL ADDRESS	COMPANY NAME

1 test account

Phone: Phone # 407-555-5555
Cell 444-444-4444
E-mail: Email test@test.com

2 test

Phone: Phone #
E-mail: Email

3 store account

Phone: Phone #
E-mail: Email

4 retail vendor abc **abc**
123 main street
orlando, fl 32809

Phone: Phone # 555-555-5555
Home 456-789-1234
Cell 987-654-3210
E-mail: Email primary@test.com
Home personal@test.com
Work work@test.com

Related Topics

Selecting the Right Report

ACCOUNT LIST BY FILTER CODE REPORT

Inventory Module ➔ *Reports* ➔ *Reports* ➔ *Accounts*

Groups each account by filter code and displays the last purchase date, last inventory date, inactivity date, and mailing indicator.

When to Use:

In addition to filtering the accounts shown based on their Filter Code, this report also displays information that other Account List reports do not, including Type of Account, Date Last Item Added, Last Purchase, Last Fee Date, and Fee Frequency.

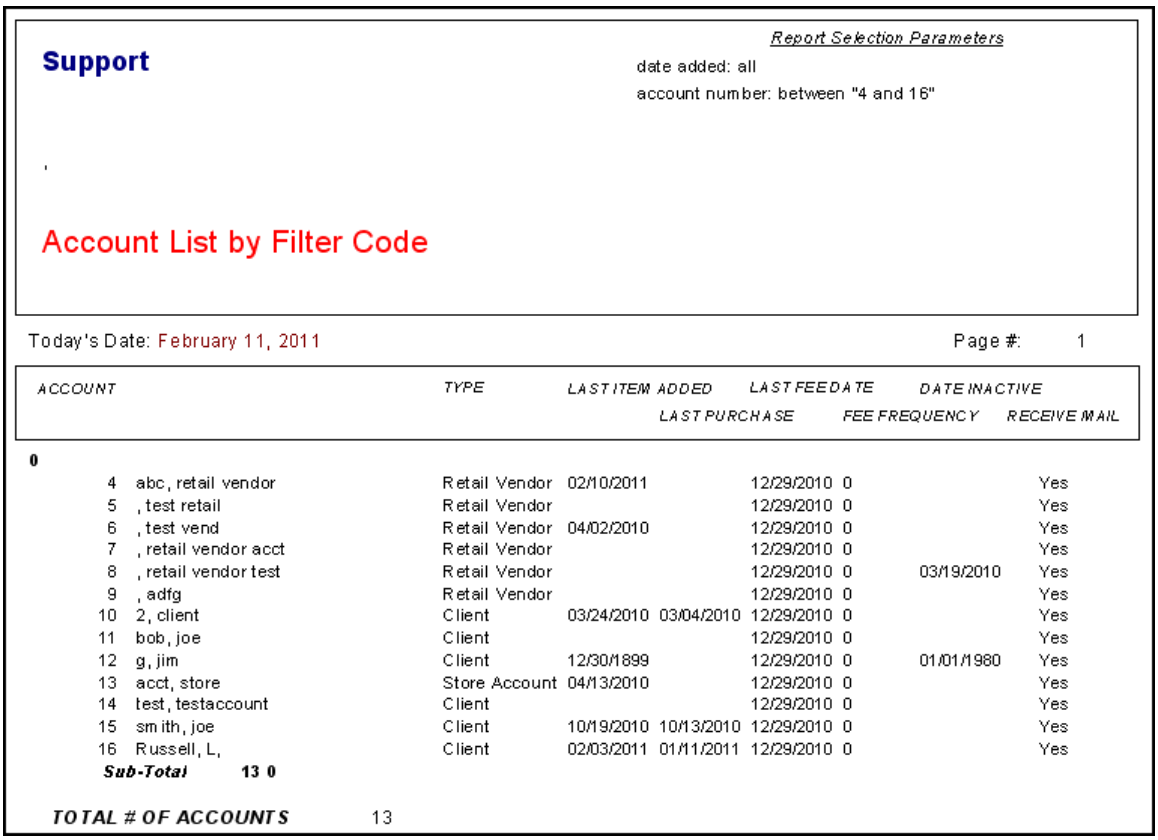
Criteria Choices:

- Account Number
- Active Account?
- Date Added
- Filter Code
- Last Transaction Date
- Last Purchase Date

Sample Report

To view a sample of the Account List by Filter Code Report, click here.

Copyright 2010, Resaleworld.com, Inc.



Support

Report Selection Parameters
date added: all
account number: between "4 and 16"

'

Account List by Filter Code

Today's Date: February 11, 2011 Page #: 1

ACCOUNT	TYPE	LAST ITEM ADDED	LAST PURCHASE	LAST FEE DATE	FEE FREQUENCY	DATE INACTIVE	RECEIVE MAIL
0							
4 abc, retail vendor	Retail Vendor	02/10/2011		12/29/2010 0			Yes
5 , test retail	Retail Vendor			12/29/2010 0			Yes
6 , test vend	Retail Vendor	04/02/2010		12/29/2010 0			Yes
7 , retail vendor acct	Retail Vendor			12/29/2010 0			Yes
8 , retail vendor test	Retail Vendor			12/29/2010 0		03/19/2010	Yes
9 , adfg	Retail Vendor			12/29/2010 0			Yes
10 2, client	Client	03/24/2010	03/04/2010	12/29/2010 0			Yes
11 bob, joe	Client			12/29/2010 0			Yes
12 g, jim	Client	12/30/1899		12/29/2010 0		01/01/1980	Yes
13 acct, store	Store Account	04/13/2010		12/29/2010 0			Yes
14 test, testaccount	Client			12/29/2010 0			Yes
15 smith, joe	Client	10/19/2010	10/13/2010	12/29/2010 0			Yes
16 Russell, L,	Client	02/03/2011	01/11/2011	12/29/2010 0			Yes
Sub-Total **13 0**							
TOTAL # OF ACCOUNTS 13							

Related Topics

Selecting the Right Report

ACCOUNT PRODUCTIVITY REPORT

Inventory Module ➔ *Reports* ➔ *Reports* ➔ *Accounts*

Displays inventory activity and matriculation in summary for each account.

When to Use:

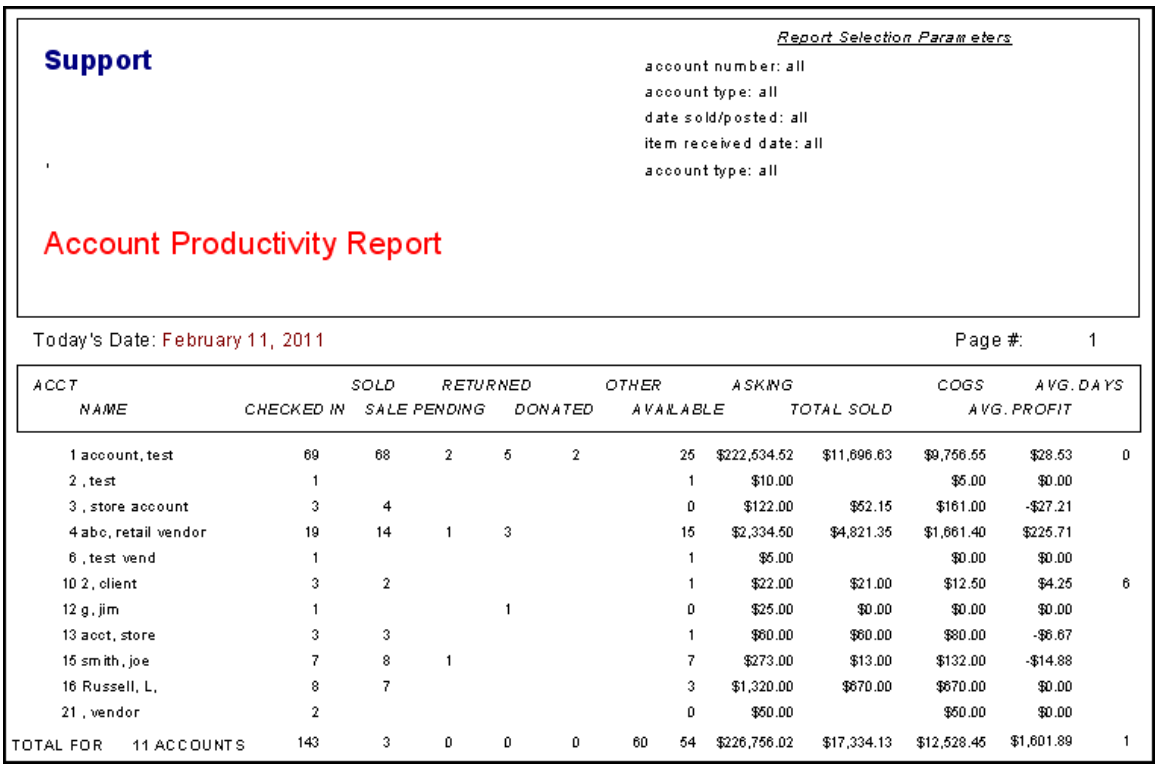
Run this report to see an overview of productivity factors for each account, including inventory entered, sold, available, profit, and average time to sell.

Criteria Choices:

- Account Number
- Account Type
- Active Account?
- Date Sold/Posted
- Item Received Date
- Account Type
- Filter Code
- Item Status
- Price Code

Sample Report

To view a sample of the Account Productivity Report, click here.



Support

Report Selection Parameters

account number: all
account type: all
date sold/posted: all
item received date: all
account type: all

Account Productivity Report

Today's Date: February 11, 2011 Page #: 1

ACCT NAME	CHECKED IN	SOLD SALE	PENDING	RETURNED DONATED		OTHER AVAILABLE	ASKING TOTAL SOLD		COGS AVG. PROFIT	AVG. DAYS	
1 account, test	69	68	2	5	2	25	$222,534.52	$11,696.63	$9,756.55	$28.53	0
2 , test	1					1	$10.00		$5.00	$0.00	
3 , store account	3	4				0	$122.00	$52.15	$161.00	-$27.21	
4 abc, retail vendor	19	14	1	3		15	$2,334.50	$4,821.35	$1,661.40	$225.71	
6 , test vend	1					1	$5.00		$0.00	$0.00	
10 2 , client	3	2				1	$22.00	$21.00	$12.50	$4.25	6
12 g, jim	1			1		0	$25.00	$0.00	$0.00	$0.00	
13 acct, store	3	3				1	$60.00	$60.00	$80.00	-$6.67	
15 smith, joe	7	8	1			7	$273.00	$13.00	$132.00	-$14.88	
16 Russell, L,	8	7				3	$1,320.00	$670.00	$670.00	$0.00	
21 , vendor	2					0	$50.00		$50.00	$0.00	
TOTAL FOR 11 ACCOUNTS	143	3	0	0	0	60	54 $226,756.02	$17,334.13	$12,528.45	$1,601.89	1

Related Topics

Selecting the Right Report

ATTRIBUTE EXPORT BY SALES REPORT

Inventory Module ➔ *Reports* ➔ *Reports* ➔ *Accounts*

Displays basic account information, including the total value of items purchased. This report is formatted specifically for exporting to a CSV or Excel file.

When to Use:

Run this report to pull basic account contact information in a format that can be exported to a file and then imported into another program such as Microsoft Outlook or Constant Contacts. This report shows (and can be filtered by) total item sales for the account.

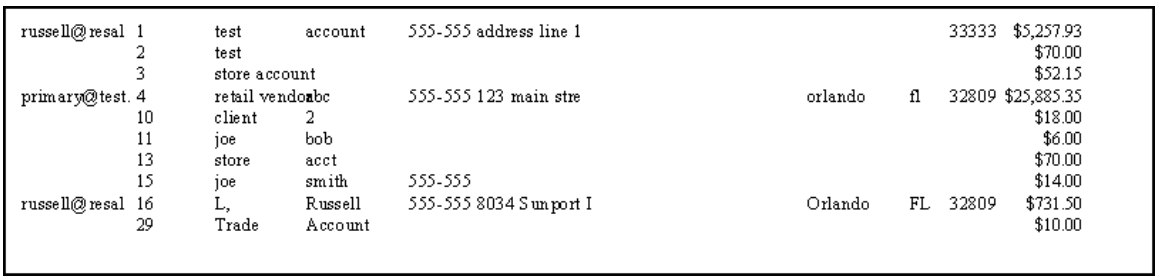
Criteria Choices:

- Account Number
- Account Type
- Active Account?
- Birth Month
- Client Rating
- Filter Code
- Has Email Address
- Last Date Item Added
- Last Purchase Date
- Total Sales
- Date Sold/Posted
- User Field (1 – 15)

Sample Report

To view a sample of the Attribute Export by Sales Report, click here.

Copyright 2010, Resaleworld.com, Inc.



russell@resal	1	test	account	555-555 address line 1			33333	$5,257.93
	2	test						$70.00
	3	store account						$52.15
primary@test.	4	retail vendo	abc	555-555 123 main stre	orlando	fl	32809	$25,885.35
	10	client	2					$18.00
	11	joe	bob					$6.00
	13	store	acct					$70.00
	15	joe	smith	555-555				$14.00
russell@resal	16	L,	Russell	555-555 8034 Sunport I	Orlando	FL	32809	$731.50
	29	Trade	Account					$10.00

Related Topics

Selecting the Right Report

REWARD PLAN LIST REPORT

Inventory Module ➔ *Reports* ➔ *Reports* ➔ *Accounts*

This report will provides a list of all reward plans and enrollees.

When to Use:

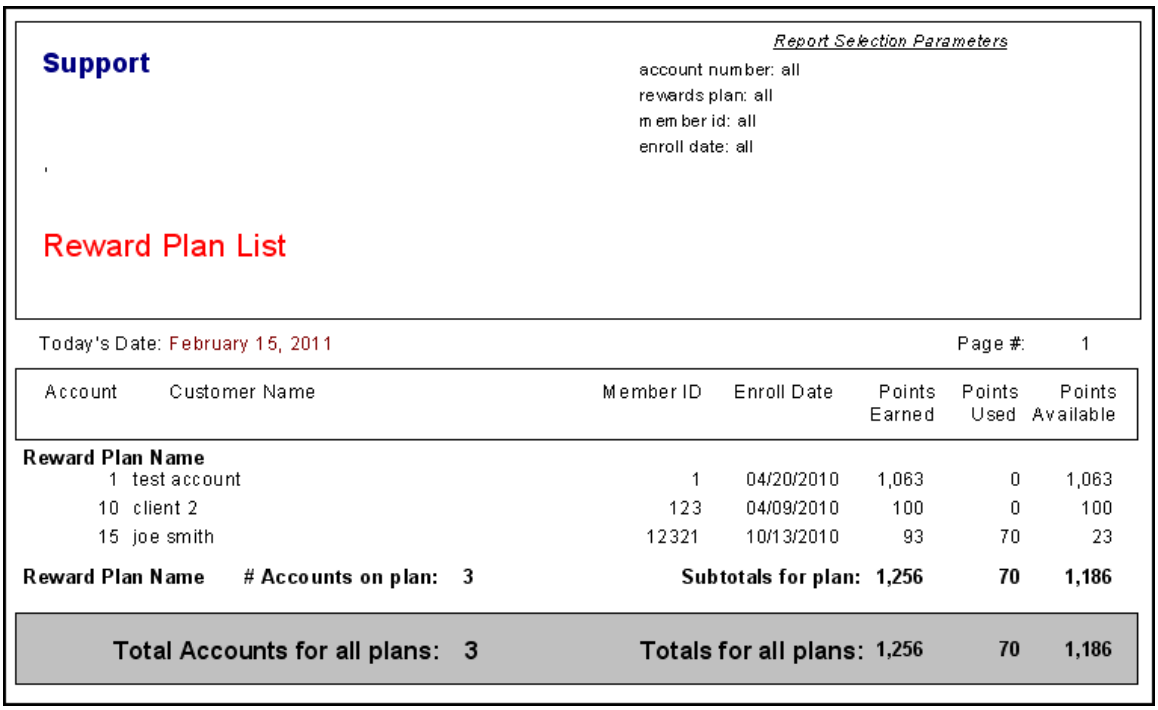
This report allows you to view information about Reward Plans and Points earned without individually viewing the Purchases tab for each account.

Criteria Choices:

- Account Number
- Rewards Plan
- Member ID
- Enroll Date

Sample Report

To view a sample of the Reward Plan List Report, click here.



Support

Report Selection Parameters
account number: all
rewards plan: all
member id: all
enroll date: all

Reward Plan List

Today's Date: February 15, 2011 Page #: 1

Account	Customer Name	Member ID	Enroll Date	Points Earned	Points Used	Points Available
Reward Plan Name						
1	test account	1	04/20/2010	1,063	0	1,063
10	client 2	123	04/09/2010	100	0	100
15	joe smith	12321	10/13/2010	93	70	23
Reward Plan Name	**# Accounts on plan: 3**		**Subtotals for plan:**	**1,256**	**70**	**1,186**
Total Accounts for all plans: 3			**Totals for all plans:**	**1,256**	**70**	**1,186**

Related Topics

Selecting the Right Report

TAX EXEMPT ACCOUNT LIST REPORT

Inventory Module → *Reports* → *Reports* → *Accounts*

Displays account information for tax exempt accounts. Report includes Address, Phone Number, Tax Exemption #, and State.

When to Use:

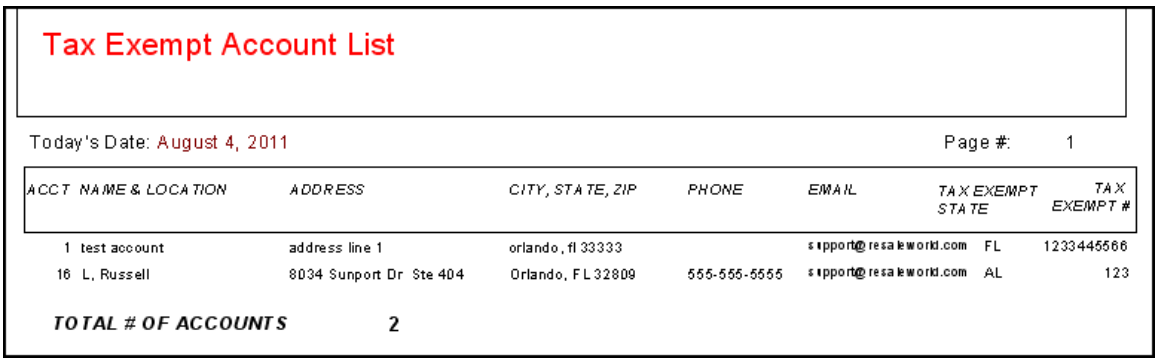
Run this report to see the tax exempt information entered for customers.

Criteria Choices:

- Active Account?
- Account Number
- Account Type
- Added By
- City
- State
- Zip Code
- Birthmonth
- Last Date Modified
- Donate Allowed
- Date Added
- Last Transaction Date
- Display Which Accounts?
- Filter Code

Sample Report

To view a sample of the Tax Exempt Account List Report, click here.



Tax Exempt Account List

Today's Date: August 4, 2011 Page #: 1

ACCT	NAME & LOCATION	ADDRESS	CITY, STATE, ZIP	PHONE	EMAIL	TAX EXEMPT STATE	TAX EXEMPT #
1	test account	address line 1	orlando, fl 33333		support@resaleworld.com	FL	1233445566
16	L, Russell	8034 Sunport Dr Ste 404	Orlando, FL 32809	555-555-5555	support@resaleworld.com	AL	123

TOTAL # OF ACCOUNTS 2

Related Topics

Selecting the Right Report

Copyright 2010, Resaleworld.com, Inc.

USER FIELDS REPORT

Inventory Module → *Reports* → *Reports* → *Accounts*

Displays all user field information for accounts containing information.

When to Use:

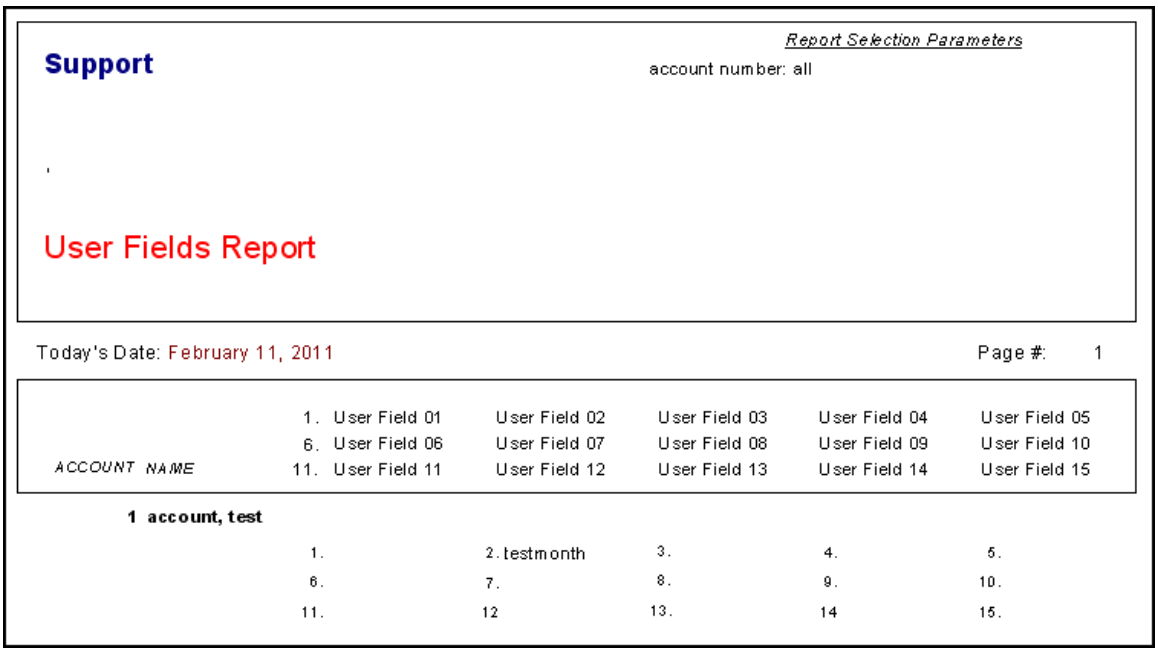
If you utilize any of the user defined fields for accounts (User Field 1 through 15), you can use this report to view information from those fields.

Criteria Choices:

- Account Number

Sample Report

To view a sample of the User Fields Report, click here.



Support

Report Selection Parameters

account number: all

User Fields Report

Today's Date: February 11, 2011 Page #: 1

ACCOUNT NAME	1. User Field 01 6. User Field 06 11. User Field 11	User Field 02 User Field 07 User Field 12	User Field 03 User Field 08 User Field 13	User Field 04 User Field 09 User Field 14	User Field 05 User Field 10 User Field 15
1 account, test					
	1.	2. testmonth	3.	4.	5.
	6.	7.	8.	9.	10.
	11.	12	13.	14	15.

Related Topics

Selecting the Right Report

WISH LIST REPORT

Inventory Module ➔ *Reports* ➔ *Reports* ➔ *Accounts*

Displays all wish lists grouped by account.

When to Use:

Run this report to find wish lists containing items by account. Use different criteria to find wish lists that were first created or that have recently expired.

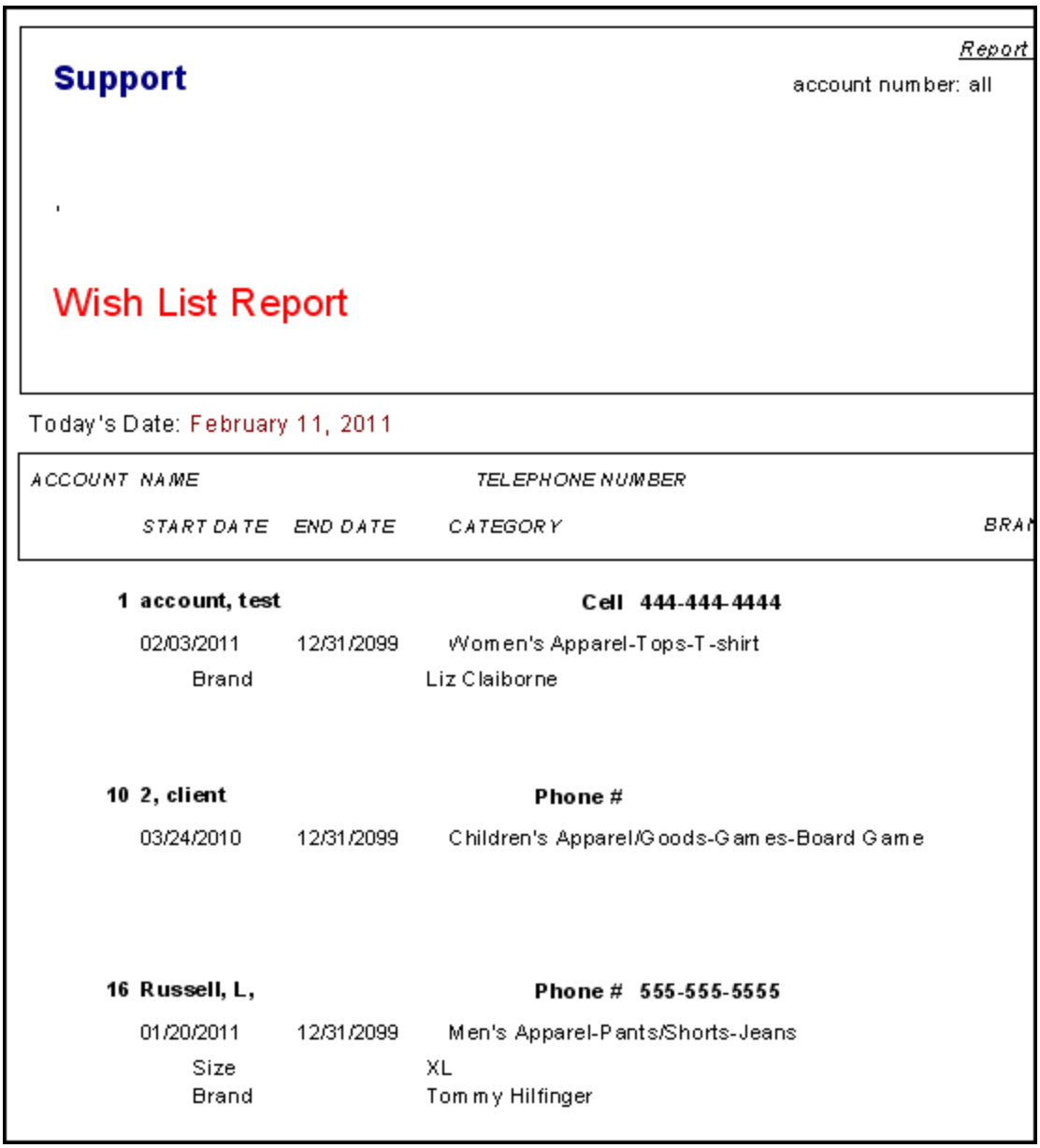
Criteria Choices:

- Account Number
- Active Account?
- Start Date
- End Date

Sample Report

To view a sample of the Wish List Report, click here.

Copyright 2010, Resaleworld.com, Inc.



Support

Report
account number: all

Wish List Report

Today's Date: February 11, 2011

ACCOUNT	NAME		TELEPHONE NUMBER	
	START DATE	END DATE	CATEGORY	BRAN
1	account, test		Cell 444-444-4444	
	02/03/2011	12/31/2099	Women's Apparel-Tops-T-shirt	
	Brand		Liz Claiborne	
10	2, client		Phone #	
	03/24/2010	12/31/2099	Children's Apparel/Goods-Games-Board Game	
16	Russell, L,		Phone # 555-555-5555	
	01/20/2011	12/31/2099	Men's Apparel-Pants/Shorts-Jeans	
	Size		XL	
	Brand		Tommy Hilfinger	

Related Topics

Selecting the Right Report

WISH LIST - CROSS REFERENCE REPORT

Inventory Module → *Reports* → *Reports* → *Accounts*

Displays all wish lists for which there are available matches, along with information on the matching items

When to Use:

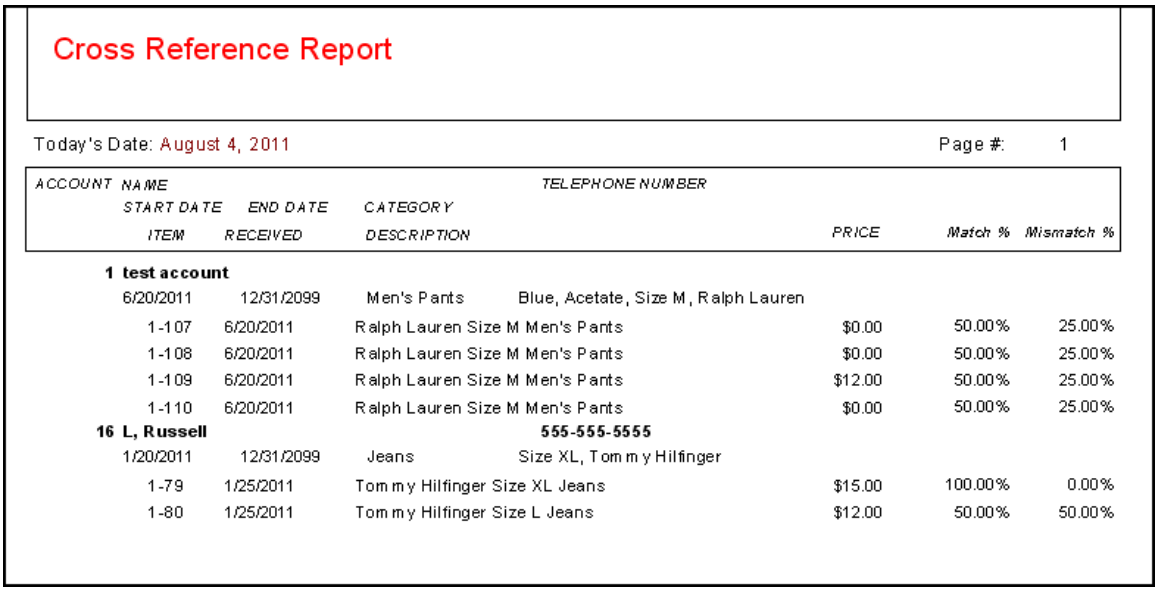
Run this report at any time to find all available items that match active wish lists.

Criteria Choices:

- Account Number
- Start Date
- End Date
- Location

Sample Report

To view a sample of the Wish List - Cross Reference Report, click here.



Cross Reference Report

Today's Date: August 4, 2011 Page #: 1

ACCOUNT NAME / START DATE / END DATE / CATEGORY / ITEM / RECEIVED / DESCRIPTION	TELEPHONE NUMBER	PRICE	Match %	Mismatch %
1 test account				
6/20/2011 12/31/2099 Men's Pants Blue, Acetate, Size M, Ralph Lauren				
1-107 6/20/2011 Ralph Lauren Size M Men's Pants		$0.00	50.00%	25.00%
1-108 6/20/2011 Ralph Lauren Size M Men's Pants		$0.00	50.00%	25.00%
1-109 6/20/2011 Ralph Lauren Size M Men's Pants		$12.00	50.00%	25.00%
1-110 6/20/2011 Ralph Lauren Size M Men's Pants		$0.00	50.00%	25.00%
16 L, Russell	**555-555-5555**			
1/20/2011 12/31/2099 Jeans Size XL, Tommy Hilfinger				
1-79 1/25/2011 Tommy Hilfinger Size XL Jeans		$15.00	100.00%	0.00%
1-80 1/25/2011 Tommy Hilfinger Size L Jeans		$12.00	50.00%	50.00%

Copyright 2010, Resaleworld.com, Inc.

Related Topics

Selecting the Right Report

LABELS BY TOTAL PURCHASES REPORT

Inventory Module → Reports → Reports → Labels

Prints labels for store customers based on their amount purchased.

> *Note: This report uses the standard Avery 5160 / 8160 label.*

When to Use:

Run this report if you wish to print labels for customers who have spent over a certain amount of money in the store.

Criteria Choices:

- Total Purchases
- Date Sold/Posted
- Account Number
- Active Account?

Sample Report

To view a sample of the Labels by Total Purchases Report, click here.

Copyright 2010, Resaleworld.com, Inc.

Related Topics

Selecting the Right Report

MAILING LABELS (2-ACROSS) REPORT

Inventory Module → *Reports* → *Reports* → *Labels*

Prints mailing labels on the 2-across thermal sticky labels sold by Resaleworld.

When to Use:

Use this report to print to labels from your tag printer.

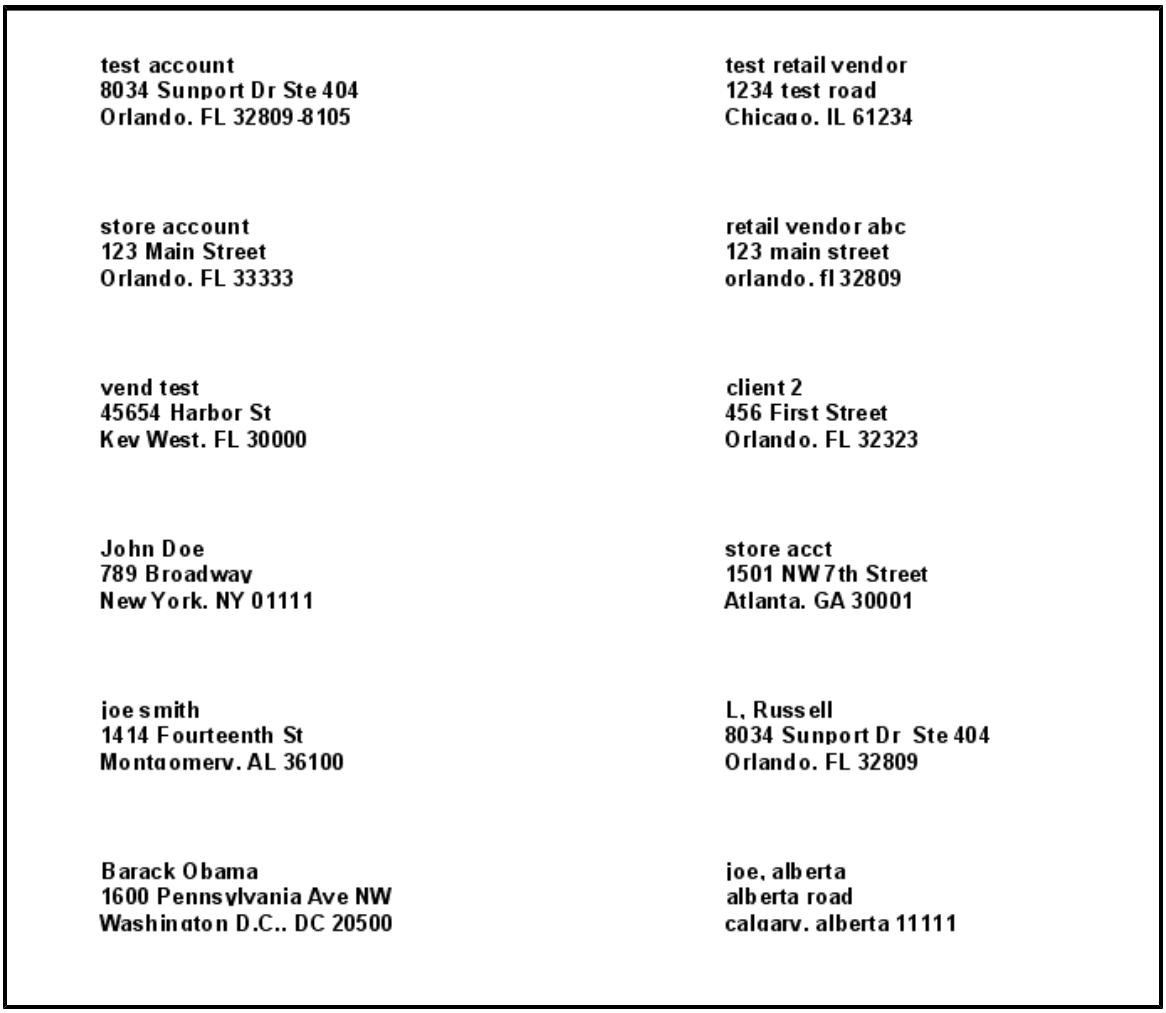
Criteria Choices:

- Account Number
- Account Type
- City
- State
- Zip Code
- Filter Code
- Last Date Item Added
- Last Purchase Date
- Has Email Address
- Client Rating
- Date Added
- Display which accounts?
- Birthmonth
- Last Payout Date
- User Field 1 through 15
- Active Account?

Copyright 2010, Resaleworld.com, Inc.

Sample Report

To view a sample of the Mailing Labels (2-Across) Report, click here.



test account
8034 Sunport Dr Ste 404
Orlando. FL 32809-8105

test retail vendor
1234 test road
Chicago. IL 61234

store account
123 Main Street
Orlando. FL 33333

retail vendor abc
123 main street
orlando. fl 32809

vend test
45654 Harbor St
Kev West. FL 30000

client 2
456 First Street
Orlando. FL 32323

John Doe
789 Broadway
New York. NY 01111

store acct
1501 NW 7th Street
Atlanta. GA 30001

joe smith
1414 Fourteenth St
Montgomery. AL 36100

L, Russell
8034 Sunport Dr Ste 404
Orlando. FL 32809

Barack Obama
1600 Pennsylvania Ave NW
Washington D.C.. DC 20500

joe, alberta
alberta road
calgary. alberta 11111

Related Topics

Selecting the Right Report

MAILING LABELS (AVERY 5160 / 8160) REPORT

Inventory Module ➔ *Reports* ➔ *Reports* ➔ *Labels*

Prints mailing labels for accounts formatted for the Avery 5160 / 8160 style label.

When to Use:

Use this report to print labels out for any account onto the popular Avery 5160 / 8160 format.

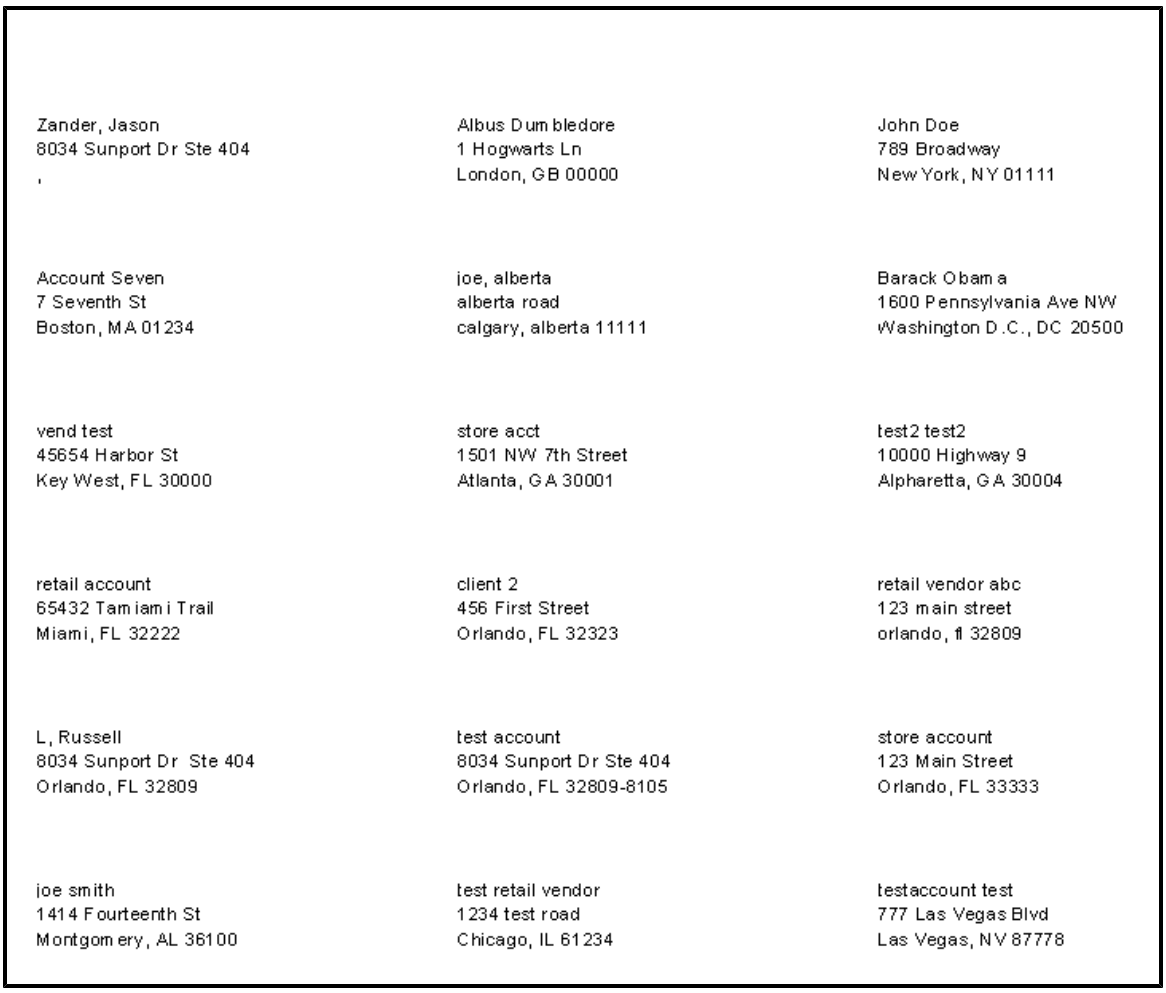
Criteria Choices:

- Account Number
- Account Type
- City
- State
- Zip Code
- Filter Code
- Last Date Item Added
- Last Purchase Date
- Has Email Address
- Client Rating
- Date Added
- Display which accounts?
- Birthmonth
- Last Payout Date
- User Field 1 through 15
- Active Account?

Sample Report

To view a sample of the Mailing Labels (3-Across) Report, click here.

Copyright 2010, Resaleworld.com, Inc.



Zander, Jason
8034 Sunport Dr Ste 404
,

Albus Dumbledore
1 Hogwarts Ln
London, GB 00000

John Doe
789 Broadway
New York, NY 01111

Account Seven
7 Seventh St
Boston, MA 01234

joe, alberta
alberta road
calgary, alberta 11111

Barack Obama
1600 Pennsylvania Ave NW
Washington D.C., DC 20500

vend test
45654 Harbor St
Key West, FL 30000

store acct
1501 NW 7th Street
Atlanta, GA 30001

test2 test2
10000 Highway 9
Alpharetta, GA 30004

retail account
65432 Tamiami Trail
Miami, FL 32222

client 2
456 First Street
Orlando, FL 32323

retail vendor abc
123 main street
orlando, fl 32809

L, Russell
8034 Sunport Dr Ste 404
Orlando, FL 32809

test account
8034 Sunport Dr Ste 404
Orlando, FL 32809-8105

store account
123 Main Street
Orlando, FL 33333

joe smith
1414 Fourteenth St
Montgomery, AL 36100

test retail vendor
1234 test road
Chicago, IL 61234

testaccount test
777 Las Vegas Blvd
Las Vegas, NV 87778

Related Topics

Selecting the Right Report

RETAIL DISCOUNT LIST REPORT

Inventory Module → *Reports* → *Reports* → *Retail*

This report lists discounts that have been created for retail items.

Copyright 2010, Resaleworld.com, Inc.

When to Use:

Run this report to quickly search through all Retail Discounts, rather than looking through each individual retail item.

Criteria Choices:

- Active Account?
- Active Discount?
- Account Number
- Category 1
- Category 2
- Category 3
- Item Received Date
- Start Date
- End Date

Sample Report

To view a sample of the Retail Discount List Report, click here.

Retail Discount List

Today's Date: August 4, 2011 Page #: 1

ACCOUNT / ITEM	REC'D DATE	ITEM NAME	ORIGINAL PRICE	SALE PRICE / SALE START DATE	SALE ENDING DATE / INACTIVE	
4	**retail vendor abc**					
1	03/24/2010	Afghan	$678.00	$300.00 01/19/2011	01/27/2011	
20	05/10/2011	Accessories	$10.00	$10.00 05/18/2011	05/20/2011	
20	05/10/2011	Accessories	$10.00	$5.00 05/24/2011	05/31/2011	*
20	05/10/2011	Accessories	$10.00	$8.00 05/12/2011	05/19/2011	
4	**retail vendor abc**					

Related Topics

Selecting the Right Report

Copyright 2010, Resaleworld.com, Inc.

RETAIL INVENTORY REPORT

Inventory Module ➔ *Reports* ➔ *Reports* ➔ *Retail*

Displays all retail inventory products with expanded detail information.

When to Use:

This report shows information about retail items, including cost per item, cost of goods on hand, and price.

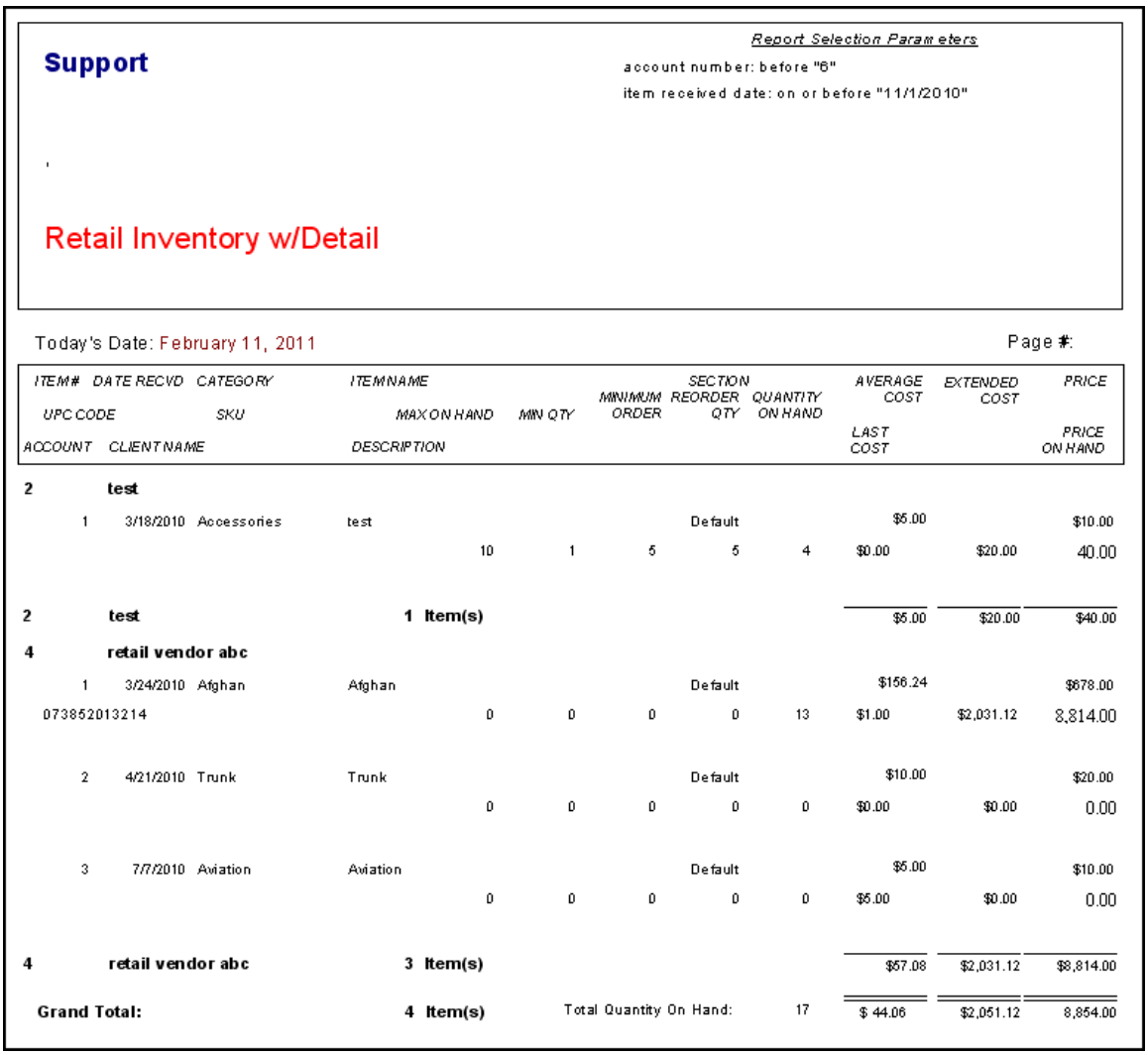
Criteria Choices:

- Account Number
- Active Account?
- Item Received Date
- Product Line
- Item Status
- Location

Sample Report

To view a sample of the Retail Inventory Report, click here.

Copyright 2010, Resaleworld.com, Inc.



Support

Report Selection Parameters
account number: before "6"
item received date: on or before "11/1/2010"

Retail Inventory w/Detail

Today's Date: February 11, 2011 Page #:

ITEM# / UPC CODE / ACCOUNT	DATE RECVD / SKU / CLIENT NAME	CATEGORY	ITEM NAME / MAX ON HAND / DESCRIPTION	MIN QTY	MINIMUM ORDER	SECTION REORDER QTY	QUANTITY ON HAND	AVERAGE COST / LAST COST	EXTENDED COST	PRICE / PRICE ON HAND
2		**test**								
1	3/18/2010	Accessories	test			Default		$5.00		$10.00
			10	1	5	5	4	$0.00	$20.00	40.00
2		**test**	**1 Item(s)**					$5.00	$20.00	$40.00
4		**retail vendor abc**								
1	3/24/2010	Afghan	Afghan			Default		$156.24		$678.00
073852013214			0	0	0	0	13	$1.00	$2,031.12	8,814.00
2	4/21/2010	Trunk	Trunk			Default		$10.00		$20.00
			0	0	0	0	0	$0.00	$0.00	0.00
3	7/7/2010	Aviation	Aviation			Default		$5.00		$10.00
			0	0	0	0	0	$5.00	$0.00	0.00
4		**retail vendor abc**	**3 Item(s)**					$57.08	$2,031.12	$8,814.00
Grand Total:			**4 Item(s)**		Total Quantity On Hand:		17	$ 44.06	$2,051.12	8,854.00

Related Topics

Selecting the Right Report

Retail Inventory with Order History Report

Inventory Module ➔ *Reports* ➔ *Reports* ➔ *Retail*

Displays all retail inventory items with order history information.

When to Use:

Run this report to see a full order history for each retail item, or to view orders received during a specific range of dates.

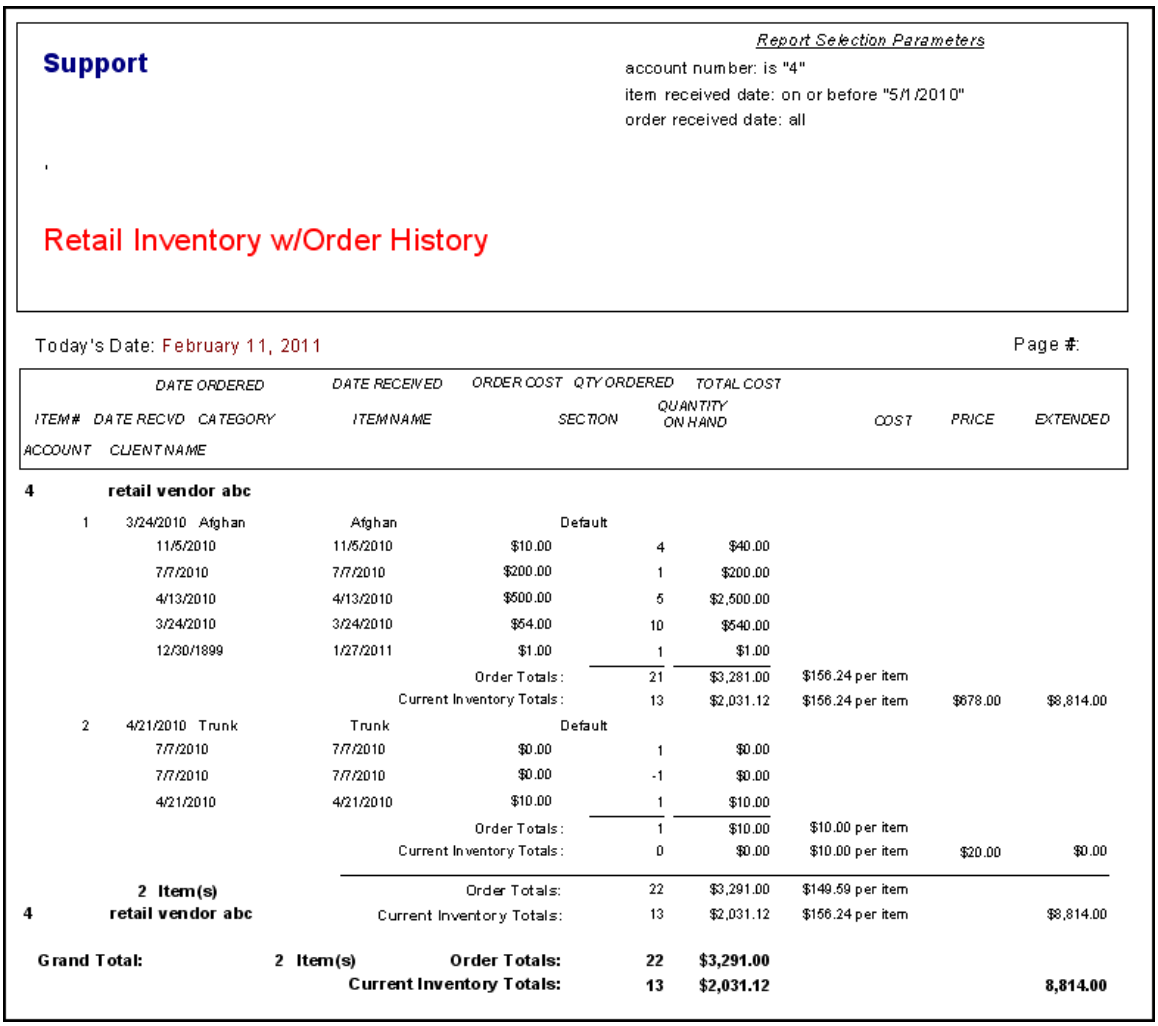
Criteria Choices:

- Account Number
- Active Account?
- Item Received Date
- Order Received Date
- Product Line
- Location
- Product Code

Sample Report

To view a sample of the Retail Inventory with Order History Report, click here.

Copyright 2010, Resaleworld.com, Inc.



Support

Report Selection Parameters
account number: is "4"
item received date: on or before "5/1/2010"
order received date: all

Retail Inventory w/Order History

Today's Date: February 11, 2011 Page #:

ITEM# / ACCOUNT	DATE RECVD / CLIENT NAME	DATE ORDERED / CATEGORY	DATE RECEIVED / ITEM NAME	ORDER COST / SECTION	QTY ORDERED / QUANTITY ON HAND	TOTAL COST	COST	PRICE	EXTENDED
4		**retail vendor abc**							
1		3/24/2010 Afghan	Afghan	Default					
		11/5/2010	11/5/2010	$10.00	4	$40.00			
		7/7/2010	7/7/2010	$200.00	1	$200.00			
		4/13/2010	4/13/2010	$500.00	5	$2,500.00			
		3/24/2010	3/24/2010	$54.00	10	$540.00			
		12/30/1899	1/27/2011	$1.00	1	$1.00			
			Order Totals:		21	$3,281.00	$156.24 per item		
			Current Inventory Totals:		13	$2,031.12	$156.24 per item	$878.00	$8,814.00
2		4/21/2010 Trunk	Trunk	Default					
		7/7/2010	7/7/2010	$0.00	1	$0.00			
		7/7/2010	7/7/2010	$0.00	-1	$0.00			
		4/21/2010	4/21/2010	$10.00	1	$10.00			
			Order Totals:		1	$10.00	$10.00 per item		
			Current Inventory Totals:		0	$0.00	$10.00 per item	$20.00	$0.00
	2 Item(s)		Order Totals:		22	$3,291.00	$149.59 per item		
4	**retail vendor abc**		Current Inventory Totals:		13	$2,031.12	$156.24 per item		$8,814.00
Grand Total:		**2 Item(s)**	**Order Totals:**		**22**	**$3,291.00**			
			Current Inventory Totals:		**13**	**$2,031.12**			**8,814.00**

Related Topics

Selecting the Right Report

RETAIL ITEMS REORDER REPORT

Inventory Module ➔ *Reports* ➔ *Reports* ➔ *Retail*

Displays any retail items that require reordering based on minimum quantity and quantity-on-hand levels. It also displays the recommended purchase order amount based on the minimum purchase level.

When to Use:

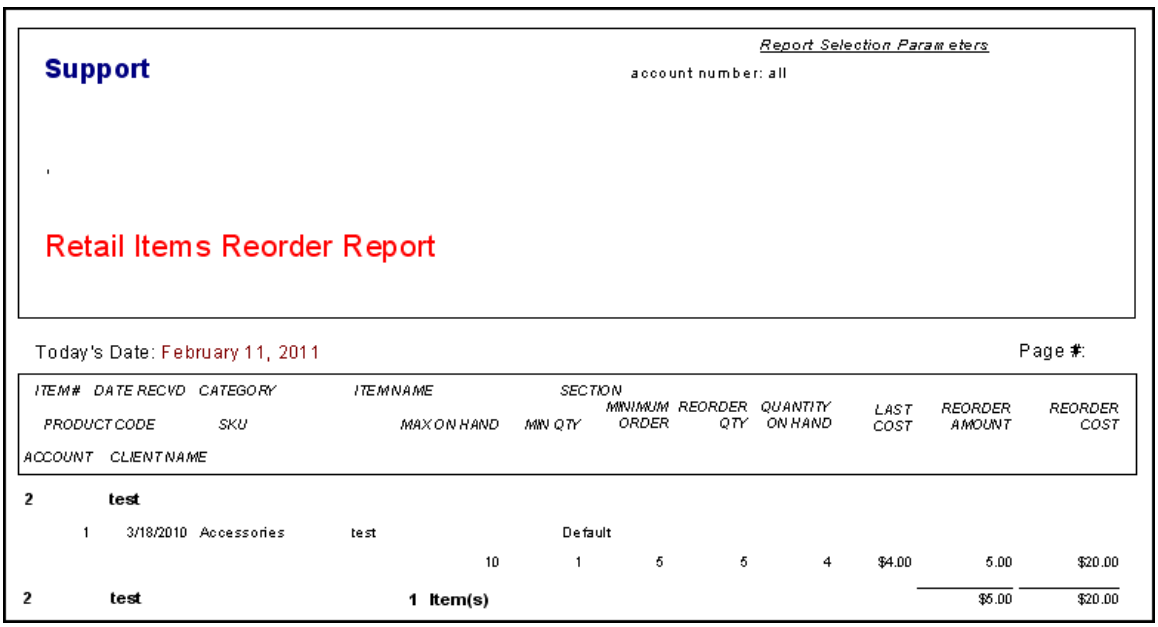
Run this report if you are using Retail-specific fields such as Minimum Order, Reorder Amount, and Reorder Quantity to help automate reordering decisions.

Criteria Choices:

- Account Number
- Active Account?
- Category 3
- Product Line
- Location

Sample Report

To view a sample of the Retail Items Reorder Report, click here.



Report Selection Parameters

Support

account number: all

Retail Items Reorder Report

Today's Date: February 11, 2011 Page #:

ITEM# / PRODUCT CODE / ACCOUNT	DATE RECVD / SKU / CLIENT NAME	CATEGORY	ITEM NAME	SECTION	MAX ON HAND	MIN QTY	MINIMUM ORDER	REORDER QTY	QUANTITY ON HAND	LAST COST	REORDER AMOUNT	REORDER COST
2	**test**											
1	3/18/2010	Accessories	test	Default								
					10	1	5	5	4	$4.00	5.00	$20.00
2	**test**				**1 Item(s)**						$5.00	$20.00

Related Topics

Selecting the Right Report

RETAIL SALES HISTORY REPORT

Inventory Module ➔ *Reports* ➔ *Reports* ➔ *Retail*

Displays all sales history detail for each retail item sorted by account.

When to Use:

Run this report to see a listing of individual sales for retail items.

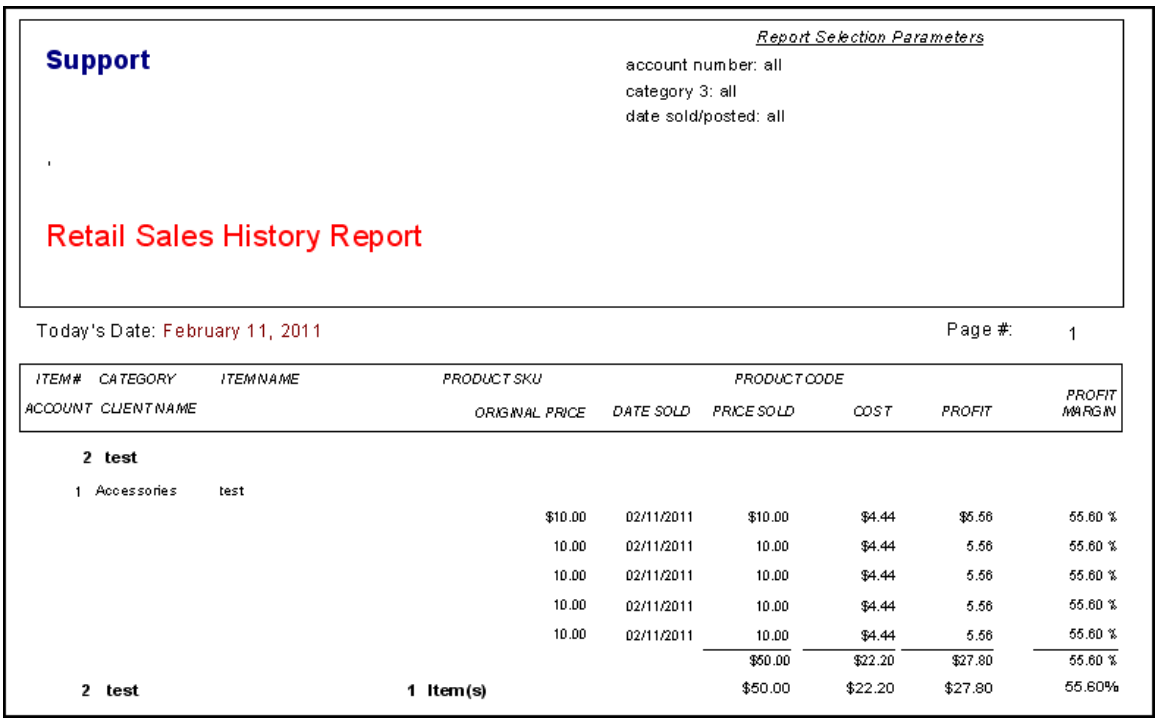
Criteria Choices:

- Account Number
- Active Account?
- Category 3
- Date Sold/Posted
- Price Code
- Product Line
- Product SKU

Sample Report

To view a sample of the Retail Sales History Report, click here.

Copyright 2010, Resaleworld.com, Inc.



Support

Report Selection Parameters
account number: all
category 3: all
date sold/posted: all

Retail Sales History Report

Today's Date: February 11, 2011 Page #: 1

ITEM#	CATEGORY	ITEMNAME	PRODUCT SKU		PRODUCT CODE			
ACCOUNT	CLIENTNAME		ORIGINAL PRICE	DATE SOLD	PRICE SOLD	COST	PROFIT	PROFIT MARGIN
2	test							
1	Accessories	test						
			$10.00	02/11/2011	$10.00	$4.44	$5.56	55.60 %
			10.00	02/11/2011	10.00	$4.44	5.56	55.60 %
			10.00	02/11/2011	10.00	$4.44	5.56	55.60 %
			10.00	02/11/2011	10.00	$4.44	5.56	55.60 %
			10.00	02/11/2011	10.00	$4.44	5.56	55.60 %
					$50.00	$22.20	$27.80	55.60 %
2	test	1 Item(s)			$50.00	$22.20	$27.80	55.60%

Related Topics

Selecting the Right Report

RETAIL SALES SUMMARY REPORT

Inventory Module → *Reports* → *Reports* → *Retail*

Displays sales summary information for all retail items.

> *Note: This report shows totals for Quantity Ordered, Quantity On Hand, Quantity Posted, and Quantity Sold.*

When to Use:

This report provides sales totals for each item, along with subtotals for each account.

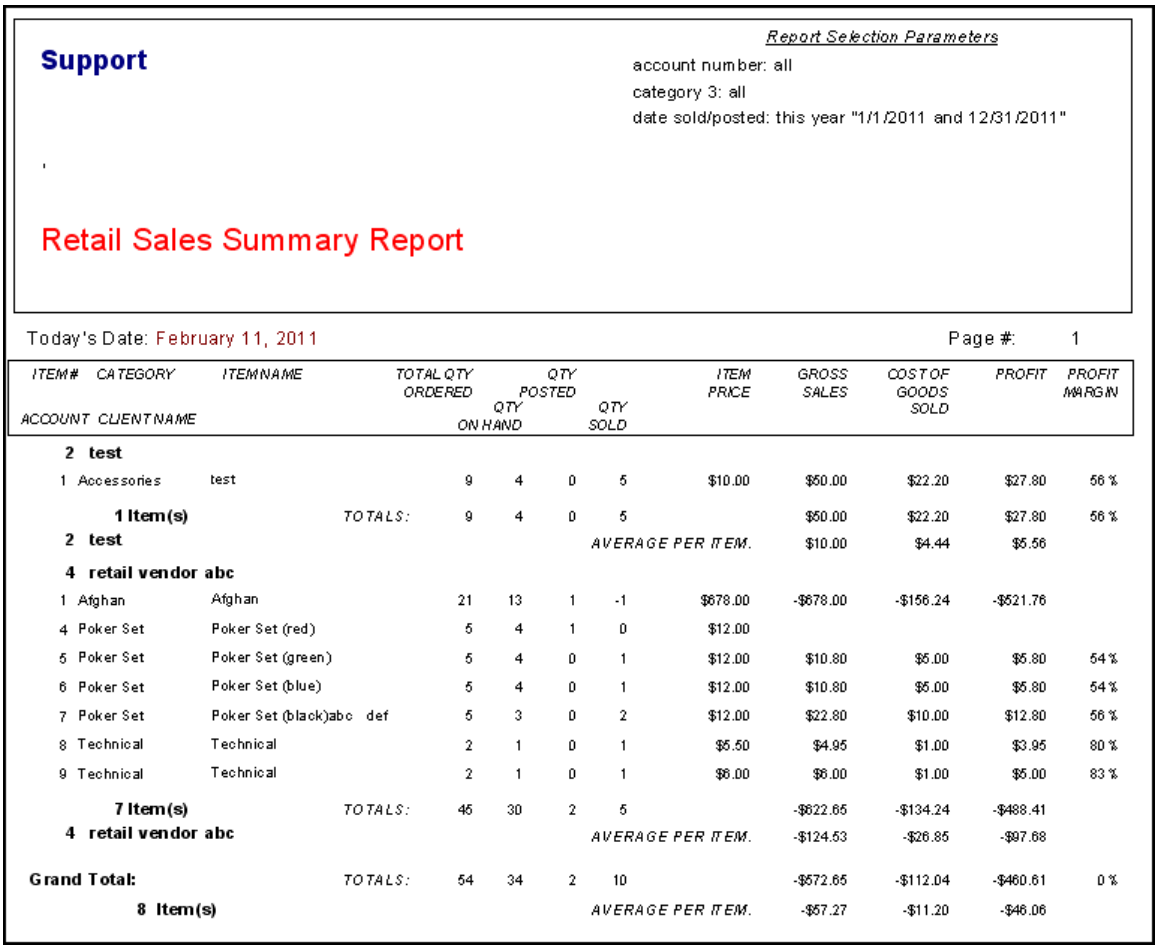
Copyright 2010, Resaleworld.com, Inc.

Criteria Choices:

- Account Number
- Category 3
- Date Sold/Posted
- Price Code
- Product Line
- Product SKU

Sample Report

To view a sample of the Retail Sales Summary Report, click here.



Support

Report Selection Parameters
account number: all
category 3: all
date sold/posted: this year "1/1/2011 and 12/31/2011"

Retail Sales Summary Report

Today's Date: February 11, 2011 Page #: 1

ITEM# / ACCOUNT	CATEGORY / CLIENT NAME	ITEM NAME	TOTAL QTY ORDERED	QTY POSTED / QTY ON HAND	QTY SOLD	ITEM PRICE	GROSS SALES	COST OF GOODS SOLD	PROFIT	PROFIT MARGIN
2	**test**									
1	Accessories	test	9	4	5	$10.00	$50.00	$22.20	$27.80	56 %
1 Item(s)		*TOTALS:*	9	4	5		$50.00	$22.20	$27.80	56 %
2	**test**				*AVERAGE PER ITEM.*		$10.00	$4.44	$5.56	
4	**retail vendor abc**									
1	Afghan	Afghan	21	13	1	-1	$678.00	-$678.00	-$156.24	-$521.76
4	Poker Set	Poker Set (red)	5	4	1	0	$12.00			
5	Poker Set	Poker Set (green)	5	4	0	1	$12.00	$10.80	$5.00	$5.80 54 %
6	Poker Set	Poker Set (blue)	5	4	0	1	$12.00	$10.80	$5.00	$5.80 54 %
7	Poker Set	Poker Set (black)abc def	5	3	0	2	$12.00	$22.80	$10.00	$12.80 56 %
8	Technical	Technical	2	1	0	1	$5.50	$4.95	$1.00	$3.95 80 %
9	Technical	Technical	2	1	0	1	$6.00	$6.00	$1.00	$5.00 83 %
7 Item(s)		*TOTALS:*	46	30	2	5		-$622.65	-$134.24	-$488.41
4	**retail vendor abc**				*AVERAGE PER ITEM.*			-$124.53	-$26.85	-$97.68
Grand Total:		*TOTALS:*	54	34	2	10		-$572.65	-$112.04	-$460.61 0 %
8 Item(s)					*AVERAGE PER ITEM.*			-$57.27	-$11.20	-$46.06

Related Topics

Selecting the Right Report

ATTRIBUTE LIST REPORT

Inventory Module → *Reports* → *Reports* → *Lists*

Displays a list of all Attribute Types and all Attribute Values for each type.

When to Use:

Run this report to see a list of all attribute values – useful for finding which attribute to add to a new category or to see if any attribute values are duplicated with an incorrect spelling.

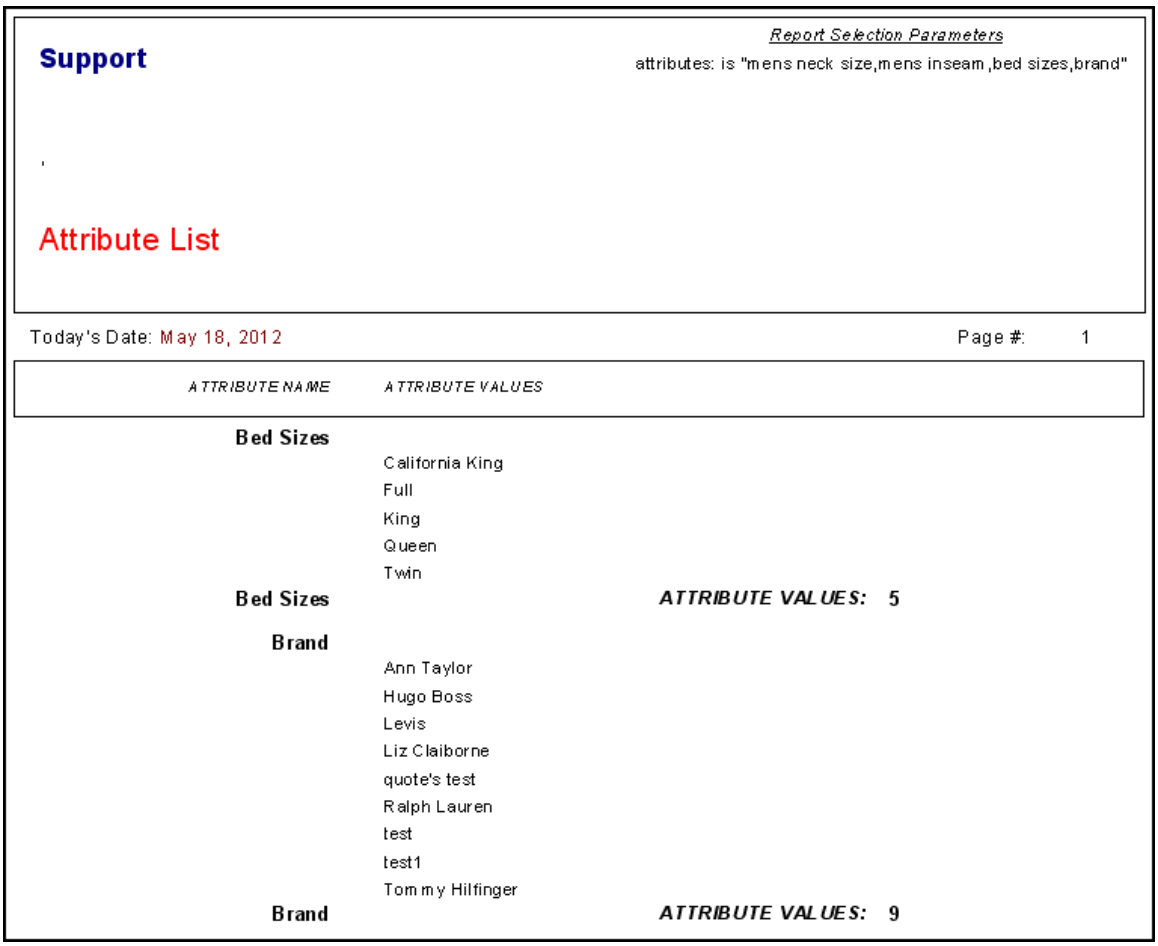
Criteria Choices:

- Attributes

Sample Report

To view a sample of the Attribute List Report, click here.

Copyright 2010, Resaleworld.com, Inc.



Support

Report Selection Parameters

attributes: is "mens neck size,mens inseam,bed sizes,brand"

Attribute List

Today's Date: May 18, 2012 Page #: 1

ATTRIBUTE NAME	ATTRIBUTE VALUES	
Bed Sizes		
	California King	
	Full	
	King	
	Queen	
	Twin	
Bed Sizes		***ATTRIBUTE VALUES:*** **5**
Brand		
	Ann Taylor	
	Hugo Boss	
	Levis	
	Liz Claiborne	
	quote's test	
	Ralph Lauren	
	test	
	test1	
	Tommy Hilfinger	
Brand		***ATTRIBUTE VALUES:*** **9**

Related Topics

Selecting the Right Report

CATEGORY LIST REPORT

Inventory Module ➔ *Reports* ➔ *Reports* ➔ *Lists*

Displays all levels of categories along with product line information.

Copyright 2010, Resaleworld.com, Inc.

When to Use:

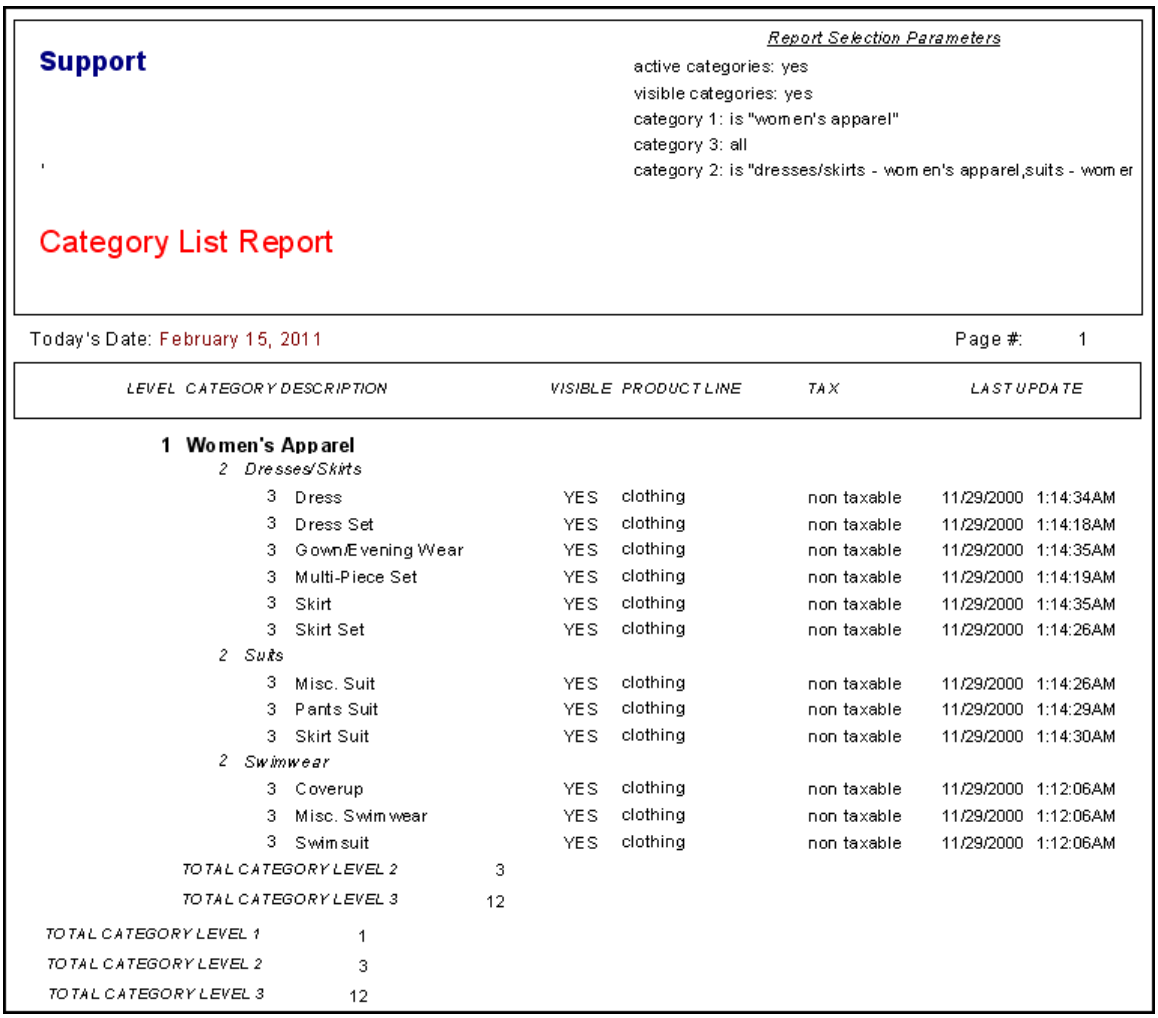
This report provides an easy way to view information for each category, such as Product Line, Tax Code, and Visible status, without having access each category individually.

Criteria Choices:

- Active Categories
- Visible Categories
- Category 1
- Category 2
- Category 3

Sample Report

To view a sample of the Category List Report, click here.



Support

Report Selection Parameters
active categories: yes
visible categories: yes
category 1: is "women's apparel"
category 3: all
category 2: is "dresses/skirts - women's apparel,suits - wom er

Category List Report

Today's Date: February 15, 2011 Page #: 1

LEVEL	CATEGORY DESCRIPTION	VISIBLE	PRODUCT LINE	TAX	LAST UPDATE
1	**Women's Apparel**				
2	*Dresses/Skirts*				
3	Dress	YES	clothing	non taxable	11/29/2000 1:14:34AM
3	Dress Set	YES	clothing	non taxable	11/29/2000 1:14:18AM
3	Gown/Evening Wear	YES	clothing	non taxable	11/29/2000 1:14:35AM
3	Multi-Piece Set	YES	clothing	non taxable	11/29/2000 1:14:19AM
3	Skirt	YES	clothing	non taxable	11/29/2000 1:14:35AM
3	Skirt Set	YES	clothing	non taxable	11/29/2000 1:14:26AM
2	*Suits*				
3	Misc. Suit	YES	clothing	non taxable	11/29/2000 1:14:26AM
3	Pants Suit	YES	clothing	non taxable	11/29/2000 1:14:29AM
3	Skirt Suit	YES	clothing	non taxable	11/29/2000 1:14:30AM
2	*Swimwear*				
3	Coverup	YES	clothing	non taxable	11/29/2000 1:12:06AM
3	Misc. Swimwear	YES	clothing	non taxable	11/29/2000 1:12:06AM
3	Swimsuit	YES	clothing	non taxable	11/29/2000 1:12:06AM
TOTAL CATEGORY LEVEL 2	3				
TOTAL CATEGORY LEVEL 3	12				
TOTAL CATEGORY LEVEL 1	1				
TOTAL CATEGORY LEVEL 2	3				
TOTAL CATEGORY LEVEL 3	12				

Related Topics

Selecting the Right Report

CATEGORY LIST WITH ATTRIBUTES REPORT

Inventory Module → *Reports* → *Reports* → *Lists*

Displays all attributes and each attribute assigned to that category.

When to Use:

Run this report to see which attributes apply to each Level-3 category.

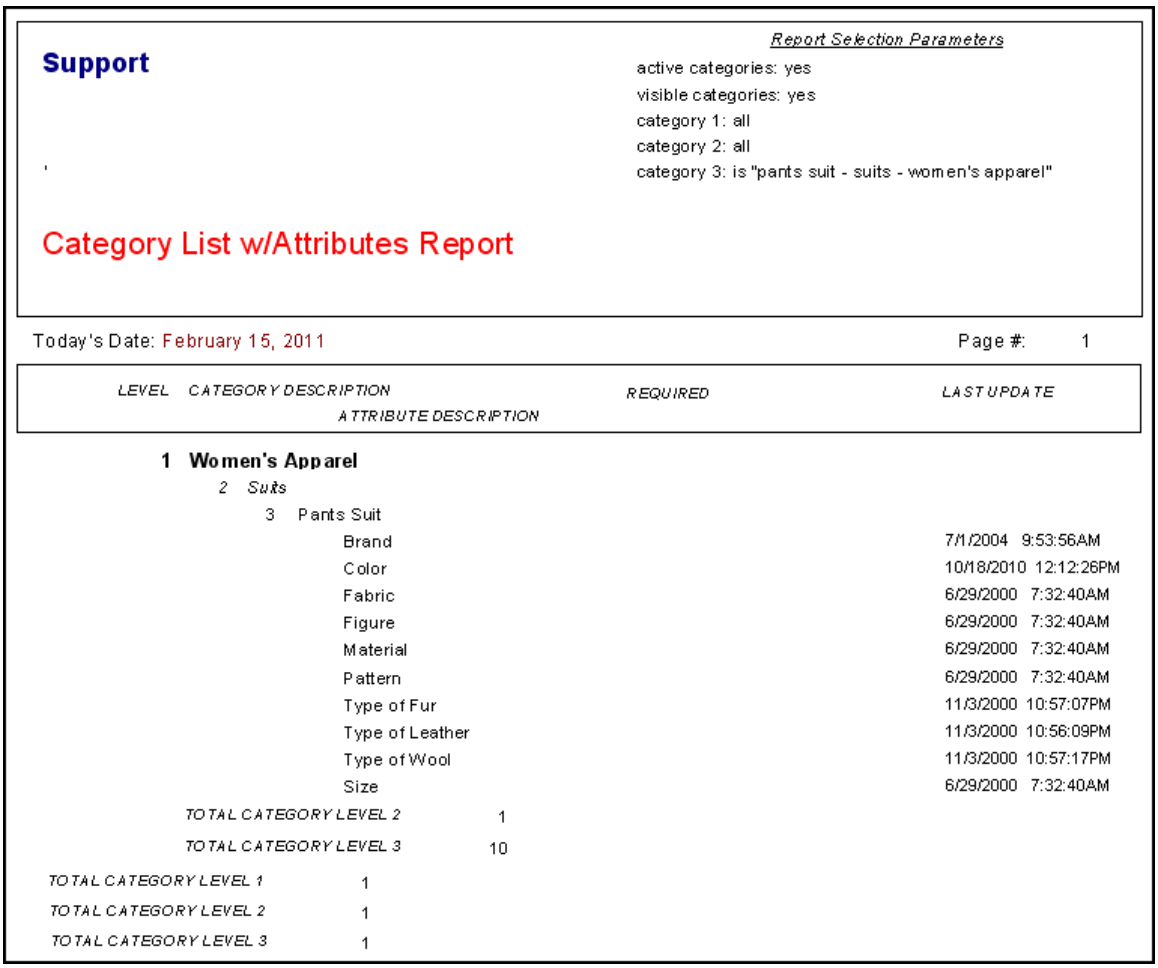
Criteria Choices:

- Active Categories
- Visible Categories
- Active Attributes
- Category 1
- Category 2
- Category 3

Sample Report

To view a sample of the Category List with Attributes Report, click here.

Copyright 2010, Resaleworld.com, Inc.



Support

Report Selection Parameters
active categories: yes
visible categories: yes
category 1: all
category 2: all
category 3: is "pants suit - suits - women's apparel"

Category List w/Attributes Report

Today's Date: February 15, 2011 Page #: 1

LEVEL	CATEGORY DESCRIPTION / ATTRIBUTE DESCRIPTION	REQUIRED	LAST UPDATE
1	**Women's Apparel**		
2	*Suits*		
3	Pants Suit		
	Brand		7/1/2004 9:53:56AM
	Color		10/18/2010 12:12:26PM
	Fabric		6/29/2000 7:32:40AM
	Figure		6/29/2000 7:32:40AM
	Material		6/29/2000 7:32:40AM
	Pattern		6/29/2000 7:32:40AM
	Type of Fur		11/3/2000 10:57:07PM
	Type of Leather		11/3/2000 10:56:09PM
	Type of Wool		11/3/2000 10:57:17PM
	Size		6/29/2000 7:32:40AM
TOTAL CATEGORY LEVEL 2		1	
TOTAL CATEGORY LEVEL 3		10	
TOTAL CATEGORY LEVEL 1		1	
TOTAL CATEGORY LEVEL 2		1	
TOTAL CATEGORY LEVEL 3		1	

Related Topics

Selecting the Right Report

PRICE CODE REPORT

Inventory Module → *Reports* → *Reports* → *Lists*

Displays information for each price code. All markdown information and time periods will be displayed.

When to Use:

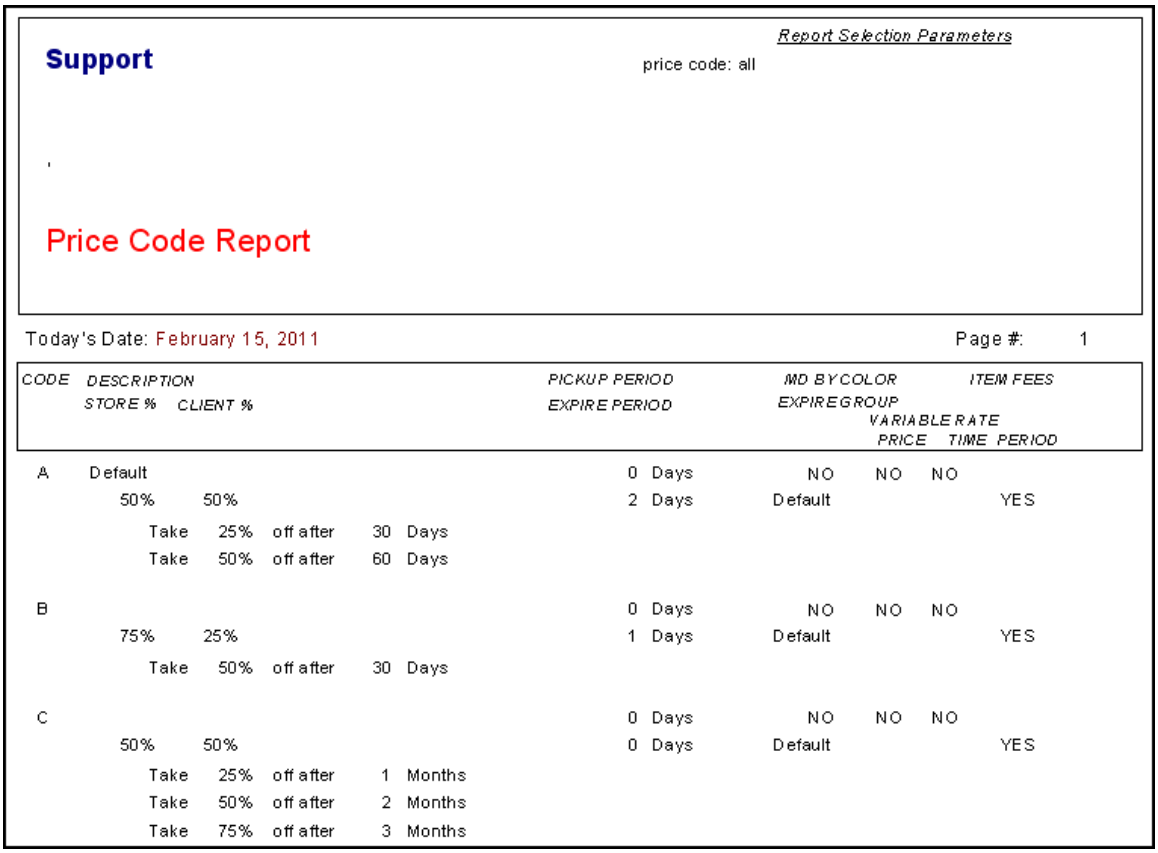
Run this report to see multiple settings from each price code side-by-side, rather than editing each Price Code individually.

Criteria Choices:

- Price Code

Sample Report

To view a sample of the Price Code Report, click here.



Support

Report Selection Parameters

price code: all

Price Code Report

Today's Date: February 15, 2011 Page #: 1

CODE	DESCRIPTION	PICKUP PERIOD	MD BY COLOR	ITEM FEES
	STORE % CLIENT %	EXPIRE PERIOD	EXPIRE GROUP	VARIABLE RATE PRICE TIME PERIOD
A	Default	0 Days	NO	NO NO
	50% 50%	2 Days	Default	YES
	Take 25% off after 30 Days			
	Take 50% off after 60 Days			
B		0 Days	NO	NO NO
	75% 25%	1 Days	Default	YES
	Take 50% off after 30 Days			
C		0 Days	NO	NO NO
	50% 50%	0 Days	Default	YES
	Take 25% off after 1 Months			
	Take 50% off after 2 Months			
	Take 75% off after 3 Months			

Related Topics

Selecting the Right Report

QUICKBOOKS LINK ACCOUNT MAPPING REPORT

Inventory Module → *Reports* → *Reports* → *Lists*

Displays mappings for all accounts that are synchronized with QuickBooks using the Quick-Books Link Module.

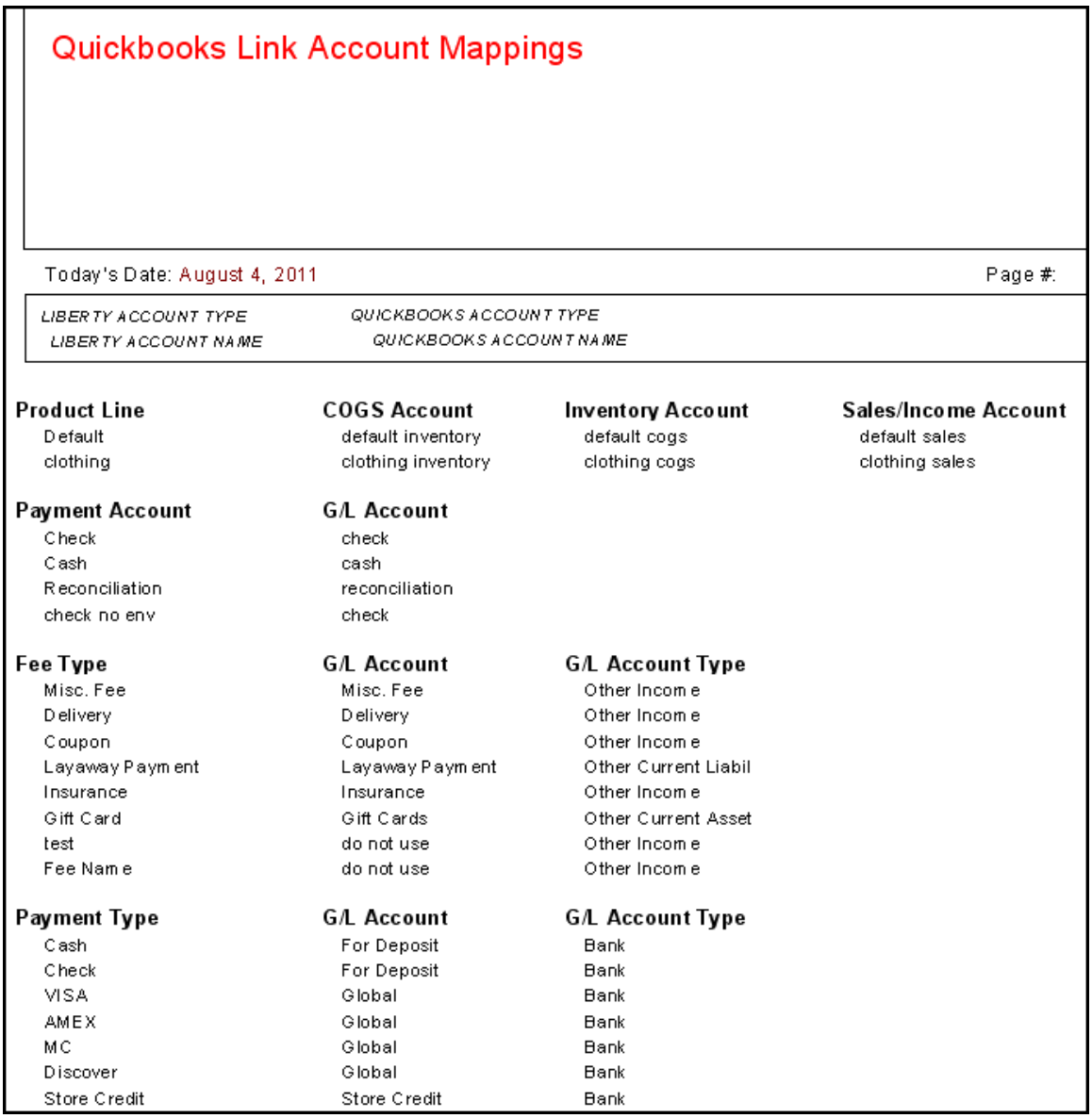
When to Use:

This report provides an easy way to print a full list of QuickBooks Account Mappings. This report is typically helpful for accountants.

Sample Report

To view a sample of the Quickbooks Link Account Mapping Report, click here.

Copyright 2010, Resaleworld.com, Inc.



Quickbooks Link Account Mappings

Today's Date: August 4, 2011 Page #:

LIBERTY ACCOUNT TYPE LIBERTY ACCOUNT NAME	QUICKBOOKS ACCOUNT TYPE QUICKBOOKS ACCOUNT NAME

Product Line	COGS Account	Inventory Account	Sales/Income Account
Default	default inventory	default cogs	default sales
clothing	clothing inventory	clothing cogs	clothing sales

Payment Account	G/L Account
Check	check
Cash	cash
Reconciliation	reconciliation
check no env	check

Fee Type	G/L Account	G/L Account Type
Misc. Fee	Misc. Fee	Other Income
Delivery	Delivery	Other Income
Coupon	Coupon	Other Income
Layaway Payment	Layaway Payment	Other Current Liabil
Insurance	Insurance	Other Income
Gift Card	Gift Cards	Other Current Asset
test	do not use	Other Income
Fee Name	do not use	Other Income

Payment Type	G/L Account	G/L Account Type
Cash	For Deposit	Bank
Check	For Deposit	Bank
VISA	Global	Bank
AMEX	Global	Bank
MC	Global	Bank
Discover	Global	Bank
Store Credit	Store Credit	Bank

Related Topics

Selecting the Right Report

Tax Type Report

Inventory Module → *Reports* → *Reports* → *Lists*

Displays all tax types along with tax type detail information.

When to Use:

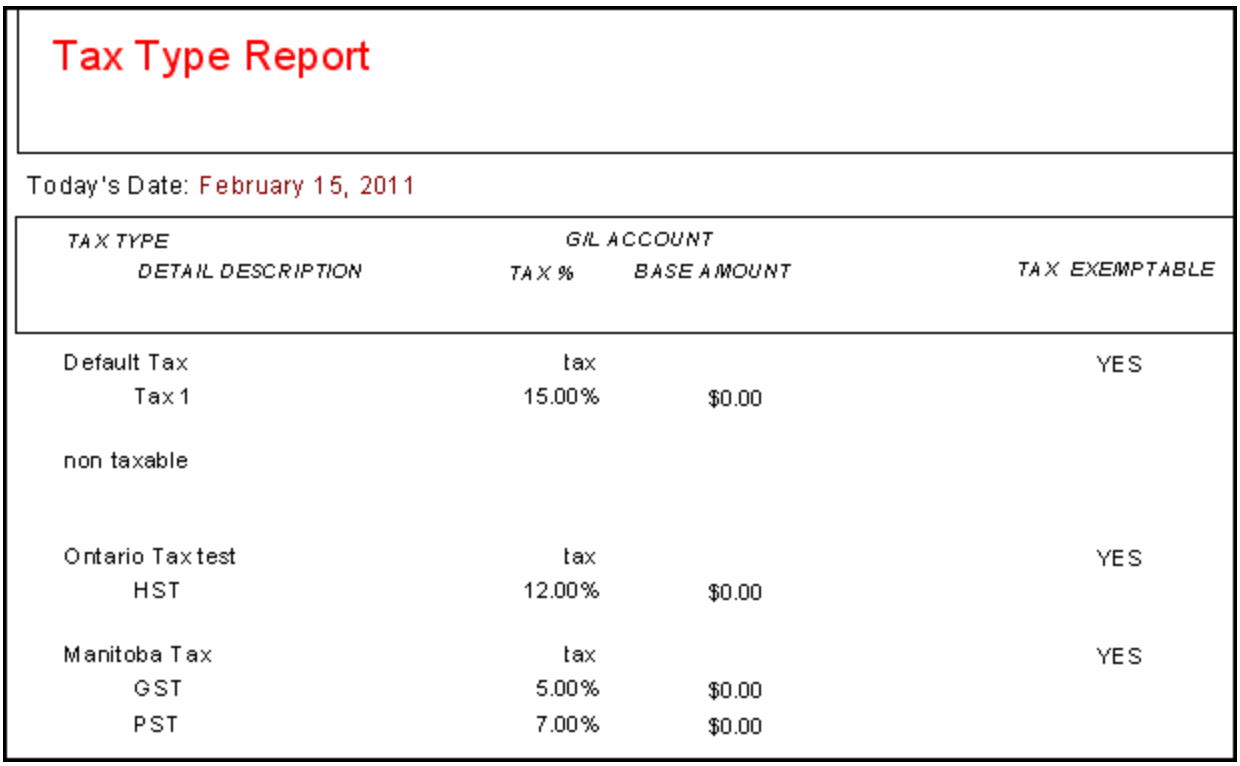
This report gives you a full view of all of your tax types at once.

Criteria Choices:

- None

Sample Report

To view a sample of the Tax Type Report, click here.



Tax Type Report

Today's Date: February 15, 2011

TAX TYPE / DETAIL DESCRIPTION	GIL ACCOUNT / TAX %	BASE AMOUNT	TAX EXEMPTABLE
Default Tax	tax		YES
Tax 1	15.00%	$0.00	
non taxable			
Ontario Tax test	tax		YES
HST	12.00%	$0.00	
Manitoba Tax	tax		YES
GST	5.00%	$0.00	
PST	7.00%	$0.00	

Copyright 2010, Resaleworld.com, Inc.

Related Topics

Selecting the Right Report

AUCTION SALES REPORT

Inventory Module → Reports → Reports → Auction & reCommerce

Displays Auction sales information for closed auctions.

When to Use:

This is a sales report that can be run on items that have a web status.

Criteria Choices:

- Account Number
- Active Account?
- Sale/Posted Date
- Auction Status
- Date Listed
- Filter Code
- Item Disposition
- Item Status
- Location
- Marketplace
- Order Status
- Sales Person
- Selling Price
- Store Section
- Auction User

Sample Report

To view a sample of the Auction Sales Report, click here.

Copyright 2010, Resaleworld.com, Inc.

Support

Report Selection Parameters

sale/posted date: all

Auction Sales

Today's Date: February 15, 2011 Page #: 1

ITEM ID / ITEM #	AUCTION ID	LISTED	ITEMNAME	DATE SOLD	PRICE SOLD	GROSS DUE	MARGIN	ADDED BY	DISPOSITION	AUCTION STATUS
1016 13 - 1			Afghan		$10.00			Account, System	Sold	Not Ready
1034 1 - 22			Animal	08/09/10	$100.00	$25.00	$75.00	Account, System	Sold	Not Ready
Grand Total:	**2 Item(s)**				**110.00**	**25.00**	**75.00**			

Related Topics

Selecting the Right Report

AUCTION STATUS REPORT

Inventory Module → *Reports* → *Reports* → *Auction & reCommerce*

Displays status information on currently running auction or closed auctions.

When to Use:

The criteria choices for this report allow searching for web items that meet a specific set of conditions.

Criteria Choices:

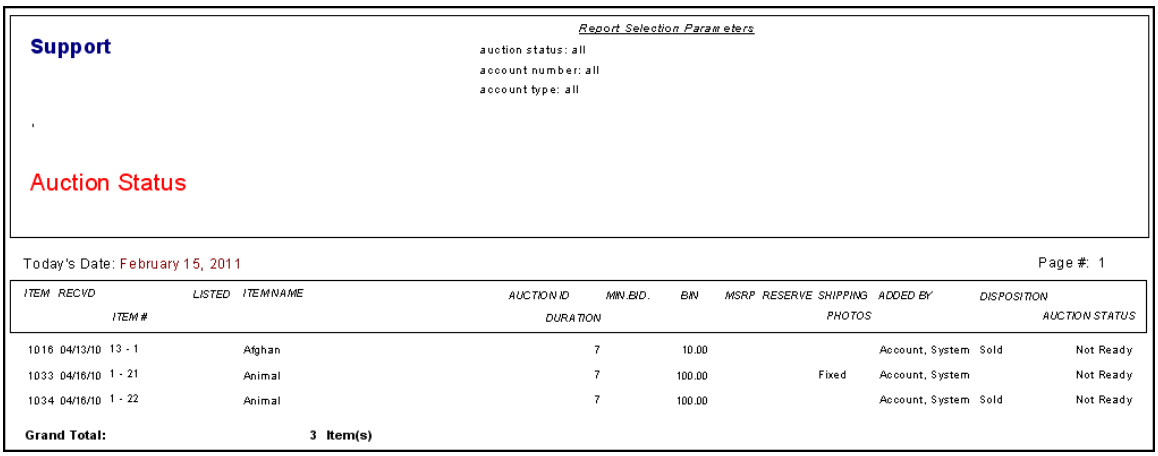
- Account Number
- Account Type
- Active Account?
- Auction Status
- Auction End Date
- Filter Code

Copyright 2010, Resaleworld.com, Inc.

- Has Images
- Item Disposition
- Item Status
- Item Received Date
- Item Status – (UD)
- Listing Date
- Location
- Marketplace
- Price Code
- Sales Person
- Shipping Method
- Store Section
- Auction User

Sample Report

To view a sample of the Auction Status Report, click here.



Report Selection Parameters

Support

auction status: all
account number: all
account type: all

Auction Status

Today's Date: February 15, 2011 Page #: 1

ITEM #	RECVD	LISTED	ITEMNAME	AUCTION ID / DURATION	MIN.BID.	BIN	MSRP	RESERVE	SHIPPING / PHOTOS	ADDED BY	DISPOSITION	AUCTION STATUS
1016	04/13/10	13 - 1	Afghan		7	10.00				Account, System	Sold	Not Ready
1033	04/16/10	1 - 21	Animal		7	100.00			Fixed	Account, System		Not Ready
1034	04/16/10	1 - 22	Animal		7	100.00				Account, System	Sold	Not Ready

Grand Total: 3 Item(s)

Related Topics

Selecting the Right Report

ORDER DETAIL REPORT

Inventory Module → Reports → Reports → Auction & reCommerce

This report displays line-by-line details for each order.

When to Use:

This report is used for simultaneously viewing information about multiple orders. Use the "Order Status" criteria to view only orders requiring a certain type of action.

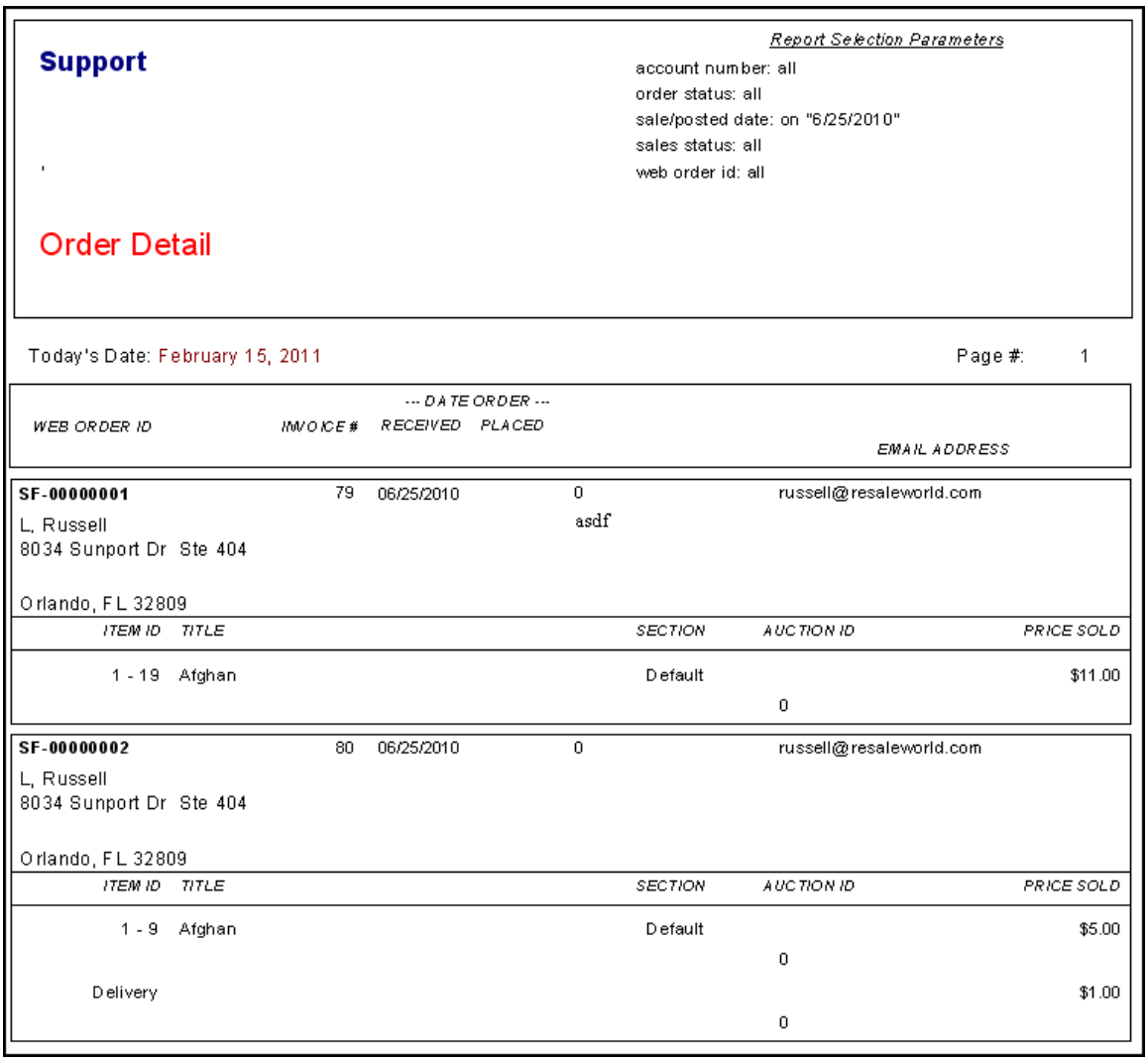
Criteria Choices:

- Account Number
- Order Status
- Sale/Posted date
- Sale Status
- Web Order ID
- Shipping Service

Sample Report

To view a sample of the Order Detail Report, click here.

Copyright 2010, Resaleworld.com, Inc.



Support

Report Selection Parameters
account number: all
order status: all
sale/posted date: on "6/25/2010"
sales status: all
web order id: all

'

Order Detail

Today's Date: February 15, 2011 Page #: 1

WEB ORDER ID	INVOICE #	--- DATE ORDER --- RECEIVED	PLACED		EMAIL ADDRESS
SF-00000001	79	06/25/2010	0		russell@resaleworld.com
L, Russell 8034 Sunport Dr Ste 404 Orlando, FL 32809			asdf		

ITEM ID	TITLE	SECTION	AUCTION ID	PRICE SOLD
1 - 19	Afghan	Default	0	$11.00

WEB ORDER ID	INVOICE #	--- DATE ORDER --- RECEIVED	PLACED		EMAIL ADDRESS
SF-00000002	80	06/25/2010	0		russell@resaleworld.com
L, Russell 8034 Sunport Dr Ste 404 Orlando, FL 32809					

ITEM ID	TITLE	SECTION	AUCTION ID	PRICE SOLD
1 - 9	Afghan	Default	0	$5.00
Delivery			0	$1.00

Related Topics

Selecting the Right Report

ORDER PICK LIST REPORT

Inventory Module ➔ *Reports* ➔ *Reports* ➔ *Auction & reCommerce*

This report shows all orders which have been paid but not completed.

When to Use:

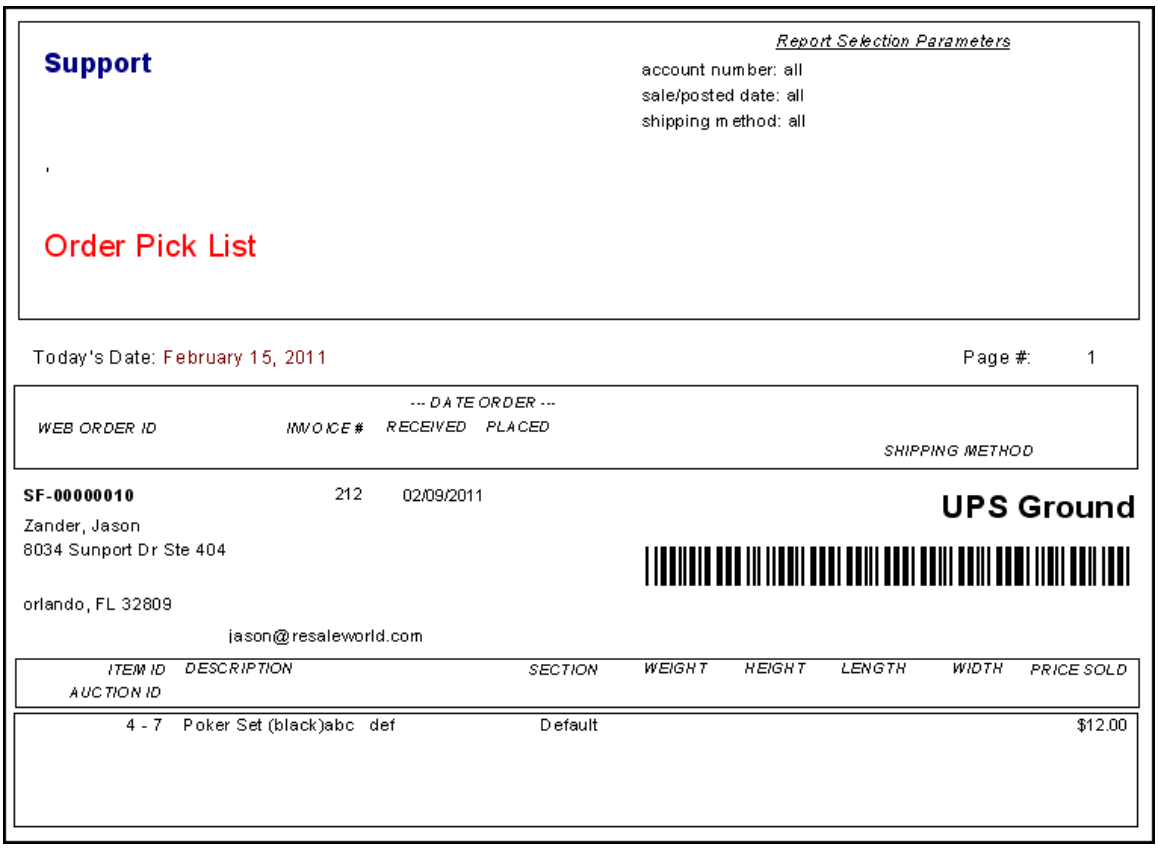
Similar to the Order Detail Report, the Order Pick List Report contains details about orders including shipping information.

Criteria Choices:

- Account Number
- Sale/Posted Date
- Shipping Method
- Sales Status
- Web Order ID
- Shipping Service

Sample Report

To view a sample of the Order Pick List Report, click here.



Support

Report Selection Parameters
account number: all
sale/posted date: all
shipping method: all

Order Pick List

Today's Date: February 15, 2011 Page #: 1

WEB ORDER ID	INVOICE #	--- DATE ORDER --- RECEIVED	PLACED	SHIPPING METHOD
SF-00000010	212	02/09/2011		UPS Ground

Zander, Jason
8034 Sunport Dr Ste 404

orlando, FL 32809

jason@resaleworld.com

ITEM ID / AUCTION ID	DESCRIPTION	SECTION	WEIGHT	HEIGHT	LENGTH	WIDTH	PRICE SOLD
4 - 7	Poker Set (black)abc def	Default					$12.00

Related Topics

Selecting the Right Report

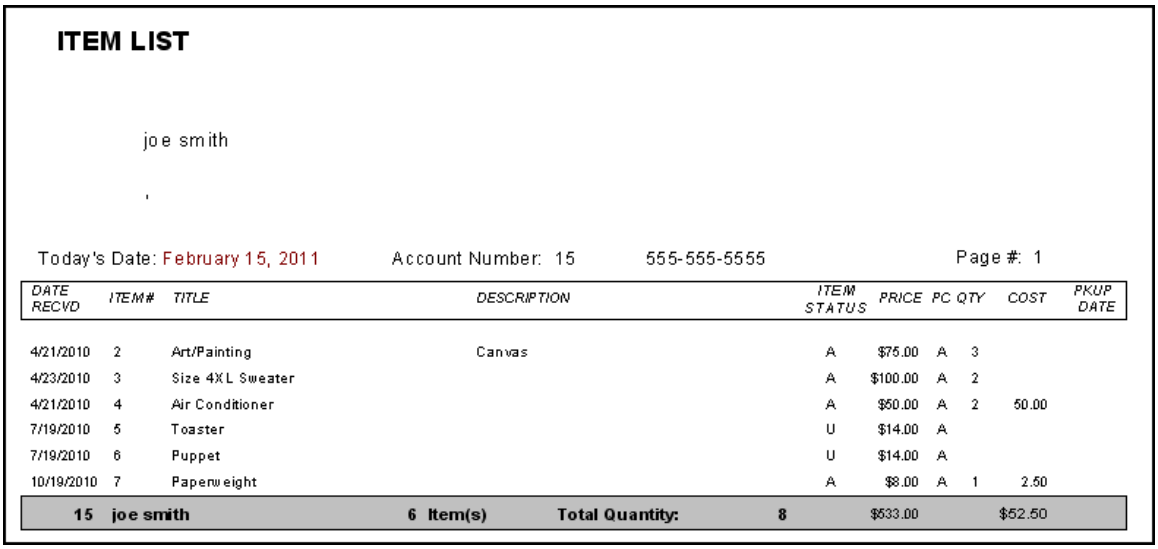
ITEM LISTS WITH TOTALS REPORT

Inventory Module ➔ *Reports* ➔ *Reports* ➔ *Item Lists*

Includes Description, Item Status, Price, Price Code, Quantity, Cost, and Pickup Date.

Sample Report

To view a sample of the Item Lists with Totals Report, click here.



ITEM LIST

joe smith

'

Today's Date: February 15, 2011 Account Number: 15 555-555-5555 Page #: 1

DATE RECVD	ITEM#	TITLE	DESCRIPTION	ITEM STATUS	PRICE	PC	QTY	COST	PKUP DATE
4/21/2010	2	Art/Painting	Canvas	A	$75.00	A	3		
4/23/2010	3	Size 4XL Sweater		A	$100.00	A	2		
4/21/2010	4	Air Conditioner		A	$50.00	A	2	50.00	
7/19/2010	5	Toaster		U	$14.00	A			
7/19/2010	6	Puppet		U	$14.00	A			
10/19/2010	7	Paperweight		A	$8.00	A	1	2.50	
15	**joe smith**	**6 Item(s)**	**Total Quantity:**	**8**	$533.00			$52.50	

Related Topics

Selecting the Right Report

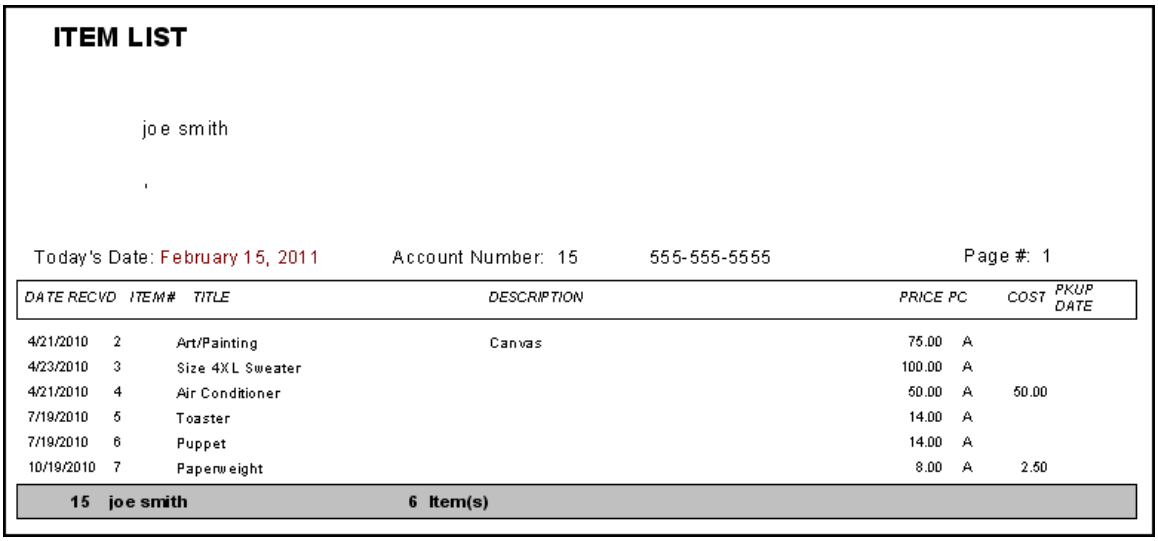
ITEM LISTS WITHOUT TOTALS REPORT

Inventory Module → *Reports* → *Reports* → *Item Lists*

Includes Description, Price, Price Code, Cost, and Pickup Date. Does not provide totals for Price or Cost.

Sample Report

To view a sample of the Item Lists without Totals Report, click here.



ITEM LIST

joe smith

'

Today's Date: February 15, 2011 Account Number: 15 555-555-5555 Page #: 1

DATE RECVD	ITEM#	TITLE	DESCRIPTION	PRICE	PC	COST	PKUP DATE
4/21/2010	2	Art/Painting	Canvas	75.00	A		
4/23/2010	3	Size 4XL Sweater		100.00	A		
4/21/2010	4	Air Conditioner		50.00	A	50.00	
7/19/2010	5	Toaster		14.00	A		
7/19/2010	6	Puppet		14.00	A		
10/19/2010	7	Paperweight		8.00	A	2.50	
15	**joe smith**		**6 Item(s)**				

Related Topics

Selecting the Right Report

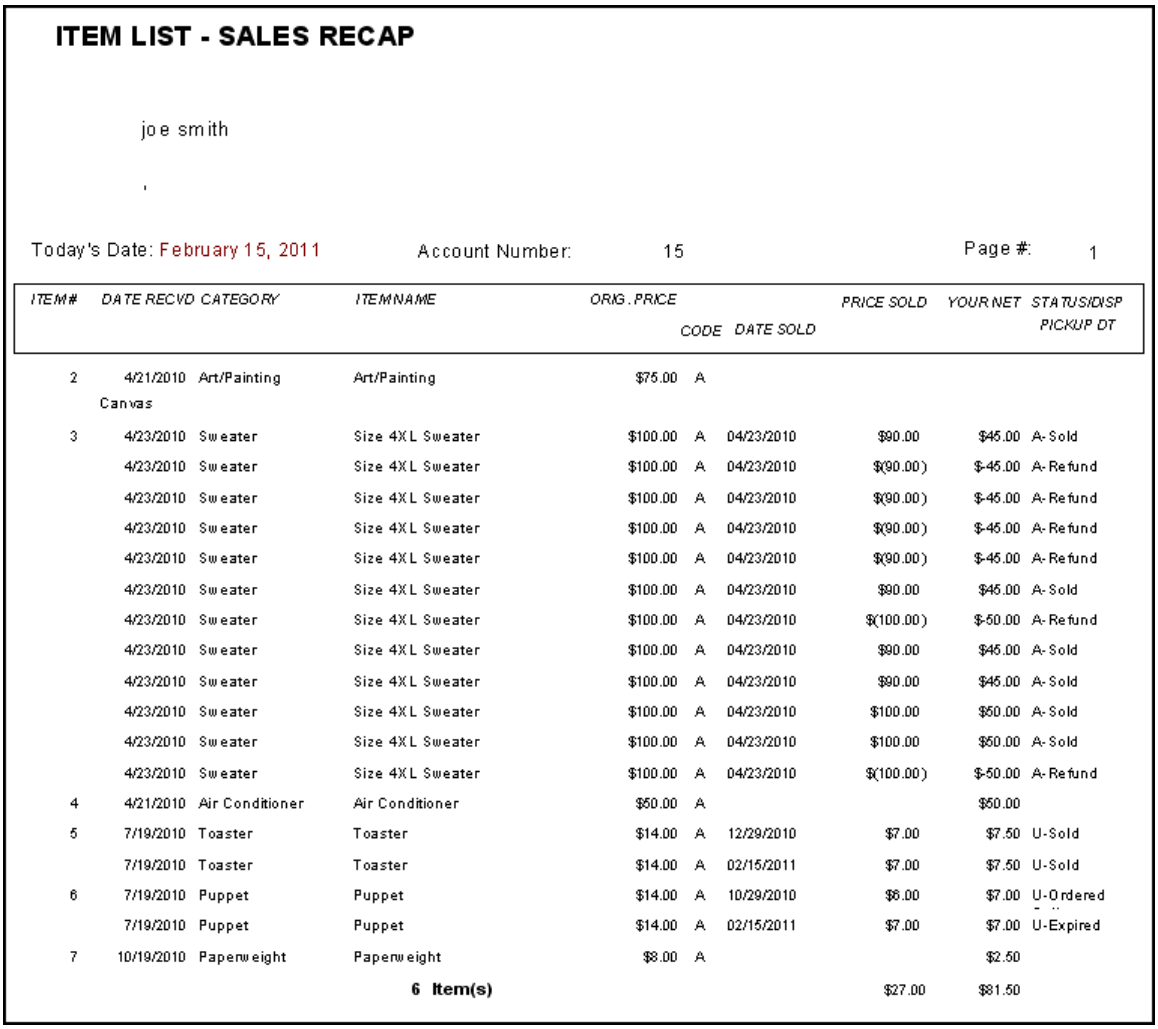
ITEM LIST - SALES RECAP REPORT

Inventory Module ➔ *Reports* ➔ *Reports* ➔ *Item Lists*

This report returns all sales records for each item. Includes Category, Orig Price, Price Code, Date Sold, Price Sold, Net, Status/Disp, Description, and Pickup Date.

Sample Report

To view a sample of the Item Lists - Sales Recap Report, click here.



ITEM LIST - SALES RECAP

joe smith

'

Today's Date: February 15, 2011 Account Number: 15 Page #: 1

ITEM#	DATE RECVD	CATEGORY	ITEM NAME	ORIG. PRICE	CODE	DATE SOLD	PRICE SOLD	YOUR NET	STATUS/DISP PICKUP DT
2	4/21/2010	Art/Painting Canvas	Art/Painting	$75.00	A				
3	4/23/2010	Sweater	Size 4XL Sweater	$100.00	A	04/23/2010	$90.00	$45.00	A-Sold
	4/23/2010	Sweater	Size 4XL Sweater	$100.00	A	04/23/2010	$(90.00)	$-45.00	A-Refund
	4/23/2010	Sweater	Size 4XL Sweater	$100.00	A	04/23/2010	$(90.00)	$-45.00	A-Refund
	4/23/2010	Sweater	Size 4XL Sweater	$100.00	A	04/23/2010	$(90.00)	$-45.00	A-Refund
	4/23/2010	Sweater	Size 4XL Sweater	$100.00	A	04/23/2010	$(90.00)	$-45.00	A-Refund
	4/23/2010	Sweater	Size 4XL Sweater	$100.00	A	04/23/2010	$90.00	$45.00	A-Sold
	4/23/2010	Sweater	Size 4XL Sweater	$100.00	A	04/23/2010	$(100.00)	$-50.00	A-Refund
	4/23/2010	Sweater	Size 4XL Sweater	$100.00	A	04/23/2010	$90.00	$45.00	A-Sold
	4/23/2010	Sweater	Size 4XL Sweater	$100.00	A	04/23/2010	$90.00	$45.00	A-Sold
	4/23/2010	Sweater	Size 4XL Sweater	$100.00	A	04/23/2010	$100.00	$50.00	A-Sold
	4/23/2010	Sweater	Size 4XL Sweater	$100.00	A	04/23/2010	$100.00	$50.00	A-Sold
	4/23/2010	Sweater	Size 4XL Sweater	$100.00	A	04/23/2010	$(100.00)	$-50.00	A-Refund
4	4/21/2010	Air Conditioner	Air Conditioner	$50.00	A			$50.00	
5	7/19/2010	Toaster	Toaster	$14.00	A	12/29/2010	$7.00	$7.50	U-Sold
	7/19/2010	Toaster	Toaster	$14.00	A	02/15/2011	$7.00	$7.50	U-Sold
6	7/19/2010	Puppet	Puppet	$14.00	A	10/29/2010	$6.00	$7.00	U-Ordered
	7/19/2010	Puppet	Puppet	$14.00	A	02/15/2011	$7.00	$7.00	U-Expired
7	10/19/2010	Paperweight	Paperweight	$8.00	A			$2.50	
			6 Item(s)				$27.00	$81.50	

Related Topics

Selecting the Right Report

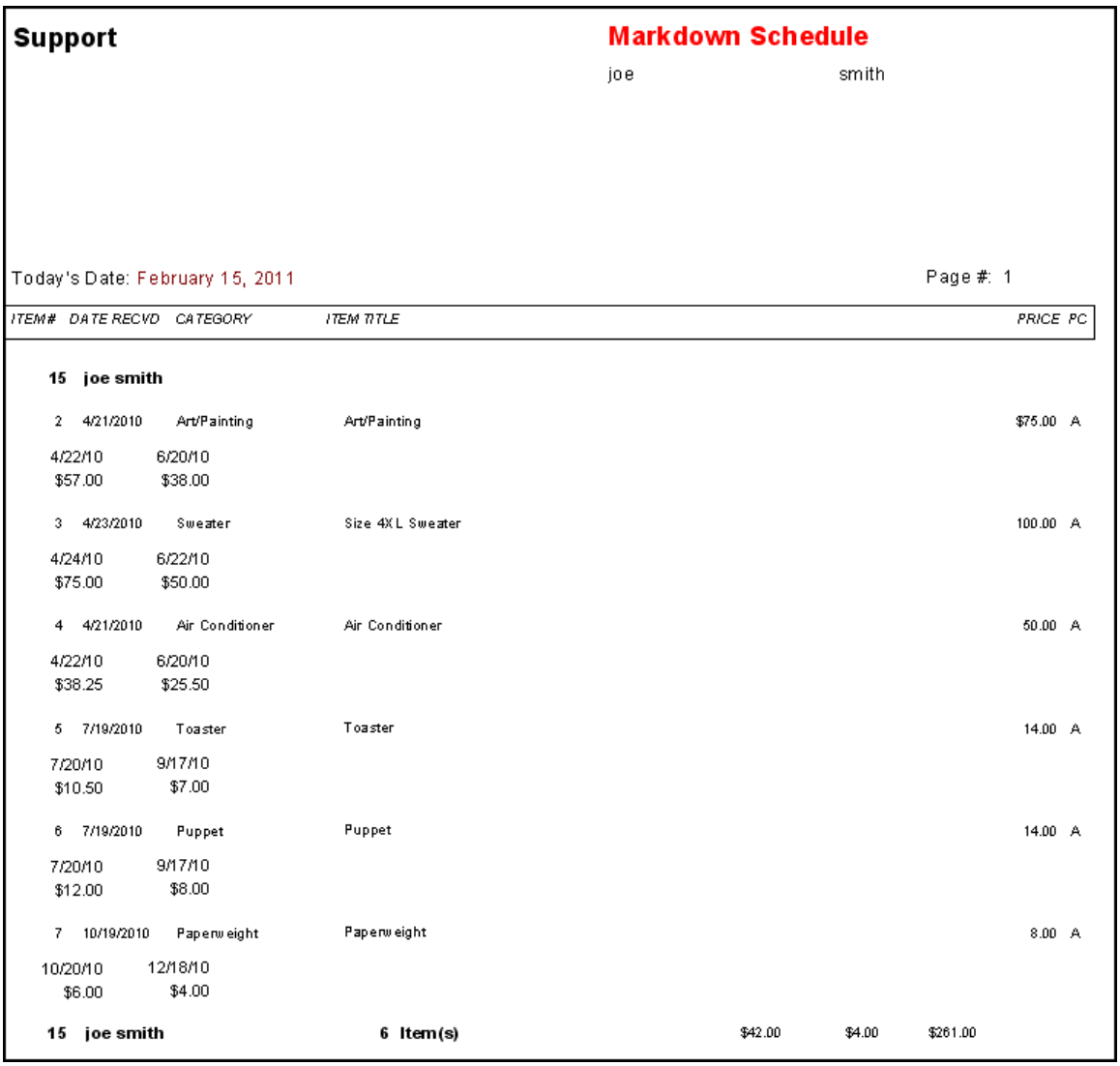
ITEM LISTS WITH MARKDOWNS REPORT

Inventory Module → Reports → Reports → Item Lists

Includes Category, Price, Price Code, and the dates and amounts from each item's markdown schedule.

Sample Report

To view a sample of the Item Lists with Markdowns Report, click here.



Support **Markdown Schedule**

joe smith

Today's Date: February 15, 2011 Page #: 1

ITEM#	DATE RECVD	CATEGORY	ITEM TITLE	PRICE	PC
15	**joe smith**				
2	4/21/2010	Art/Painting	Art/Painting	$75.00	A
4/22/10	6/20/10				
$57.00	$38.00				
3	4/23/2010	Sweater	Size 4XL Sweater	100.00	A
4/24/10	6/22/10				
$75.00	$50.00				
4	4/21/2010	Air Conditioner	Air Conditioner	50.00	A
4/22/10	6/20/10				
$38.25	$25.50				
5	7/19/2010	Toaster	Toaster	14.00	A
7/20/10	9/17/10				
$10.50	$7.00				
6	7/19/2010	Puppet	Puppet	14.00	A
7/20/10	9/17/10				
$12.00	$8.00				
7	10/19/2010	Paperweight	Paperweight	8.00	A
10/20/10	12/18/10				
$6.00	$4.00				
15	**joe smith**	**6 Item(s)**	$42.00 $4.00 $261.00		

Related Topics

Selecting the Right Report

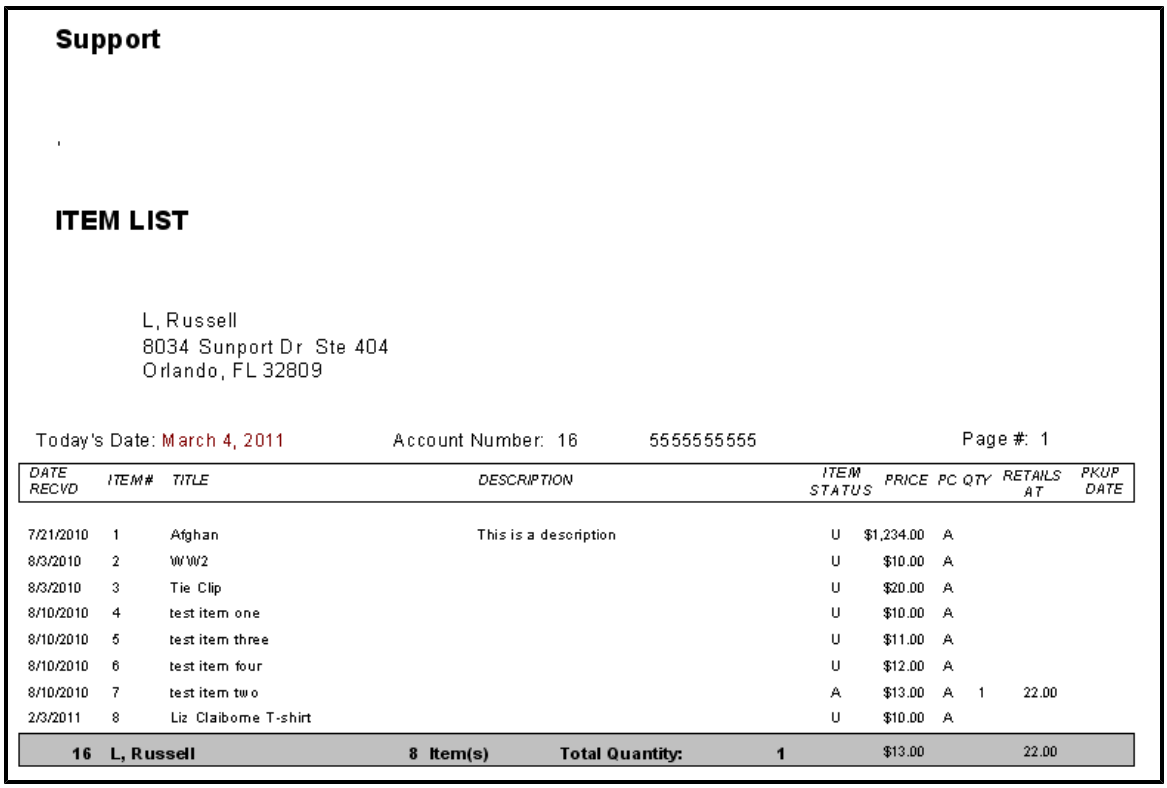
ITEM LISTS WITH RETAILS PRICE (AVAILABLE) REPORT

Inventory Module → *Reports* → *Reports* → *Item Lists*

Variation of the Item List with Totals Report that replaces the "Cost" field with the "Retail Price" field. Only shows the total retail prices of items currently available.

Sample Report

To view a sample of the Item Lists with Retails Price (available) Report, click here.



Support

ITEM LIST

L, Russell
8034 Sunport Dr Ste 404
Orlando, FL 32809

Today's Date: March 4, 2011 Account Number: 16 5555555555 Page #: 1

DATE RECVD	ITEM#	TITLE	DESCRIPTION	ITEM STATUS	PRICE	PC	QTY	RETAILS AT	PKUP DATE
7/21/2010	1	Afghan	This is a description	U	$1,234.00	A			
8/3/2010	2	WW2		U	$10.00	A			
8/3/2010	3	Tie Clip		U	$20.00	A			
8/10/2010	4	test item one		U	$10.00	A			
8/10/2010	5	test item three		U	$11.00	A			
8/10/2010	6	test item four		U	$12.00	A			
8/10/2010	7	test item two		A	$13.00	A	1	22.00	
2/3/2011	8	Liz Claiborne T-shirt		U	$10.00	A			
16	**L, Russell**		**8 Item(s)**	**Total Quantity:**	**1**			**22.00**	

Related Topics

Selecting the Right Report

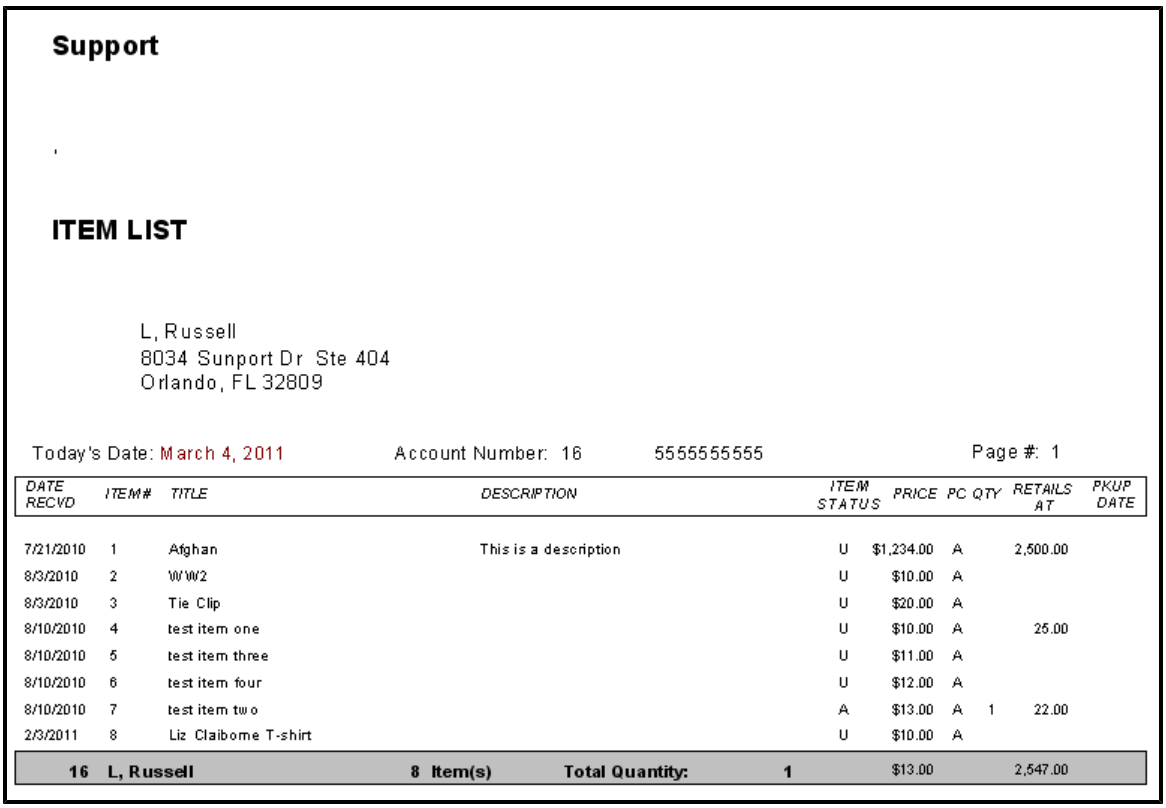
Item Lists with Retails Price (all) Report

Inventory Module ➔ *Reports* ➔ *Reports* ➔ *Item Lists*

Variation of Item List with Totals Report that replaces the "Cost" field with the "Retail Price" field. Shows the total retail prices of all listed items, whether or not the item is available.

Sample Report

To view a sample of the Item Lists with Retails Price (all) Report, click here.



Support

ITEM LIST

L, Russell
8034 Sunport Dr Ste 404
Orlando, FL 32809

Today's Date: March 4, 2011 Account Number: 16 5555555555 Page #: 1

DATE RECVD	ITEM#	TITLE	DESCRIPTION	ITEM STATUS	PRICE	PC	QTY	RETAILS AT	PKUP DATE
7/21/2010	1	Afghan	This is a description	U	$1,234.00	A		2,500.00	
8/3/2010	2	WW2		U	$10.00	A			
8/3/2010	3	Tie Clip		U	$20.00	A			
8/10/2010	4	test item one		U	$10.00	A		25.00	
8/10/2010	5	test item three		U	$11.00	A			
8/10/2010	6	test item four		U	$12.00	A			
8/10/2010	7	test item two		A	$13.00	A	1	22.00	
2/3/2011	8	Liz Claiborne T-shirt		U	$10.00	A			
16	**L, Russell**	**8 Item(s)**	**Total Quantity:**	**1**	$13.00			2,547.00	

Related Topics

Selecting the Right Report

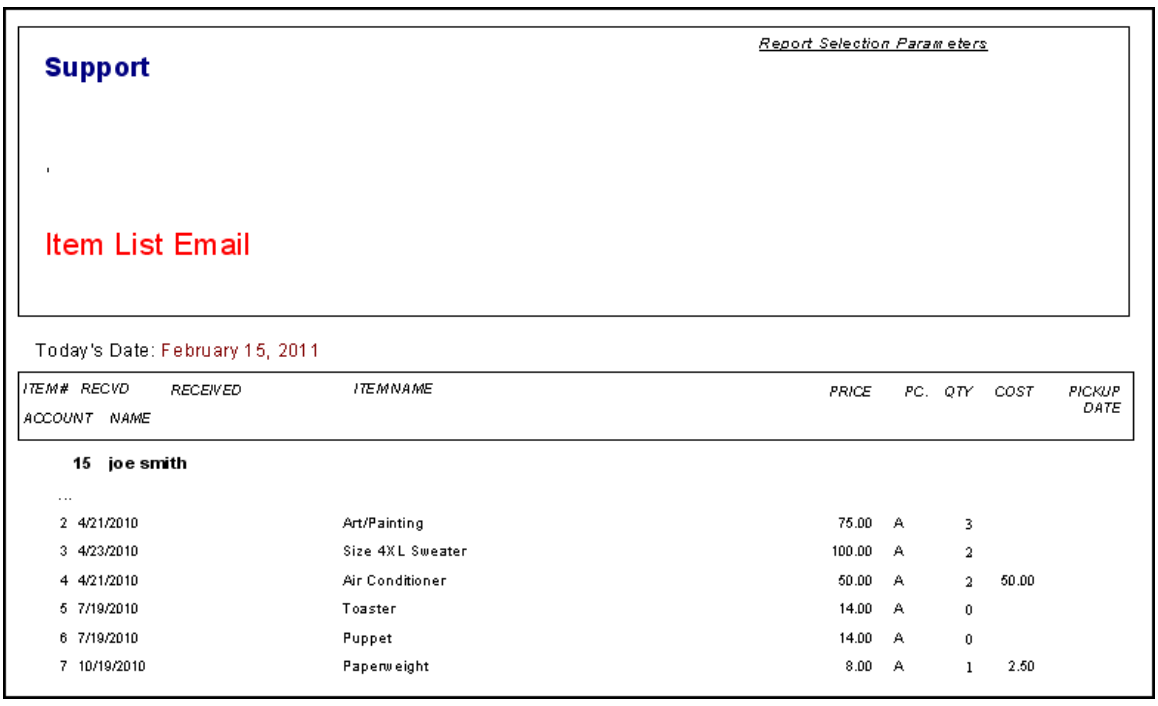
ITEM LIST WITH EMAIL REPORT

Inventory Module ➔ *Reports* ➔ *Reports* ➔ *Item Lists*

Emails the item list to the customer. Includes Price, Price Code, Quantity, Cost, and Pickup Date.

Sample Report

To view a sample of the Item Lists Email Report, click here.



Report Selection Parameters

Support

Item List Email

Today's Date: February 15, 2011

ITEM# ACCOUNT	RECVD	RECEIVED NAME	ITEMNAME	PRICE	PC.	QTY	COST	PICKUP DATE
15	**joe smith**							
...								
2	4/21/2010		Art/Painting	75.00	A	3		
3	4/23/2010		Size 4XL Sweater	100.00	A	2		
4	4/21/2010		Air Conditioner	50.00	A	2	50.00	
5	7/19/2010		Toaster	14.00	A	0		
6	7/19/2010		Puppet	14.00	A	0		
7	10/19/2010		Paperweight	8.00	A	1	2.50	

Related Topics

Selecting the Right Report

ITEM LIST TRADE VALUE REPORT

Inventory Module ➔ *Reports* ➔ *Reports* ➔ *Item Lists*

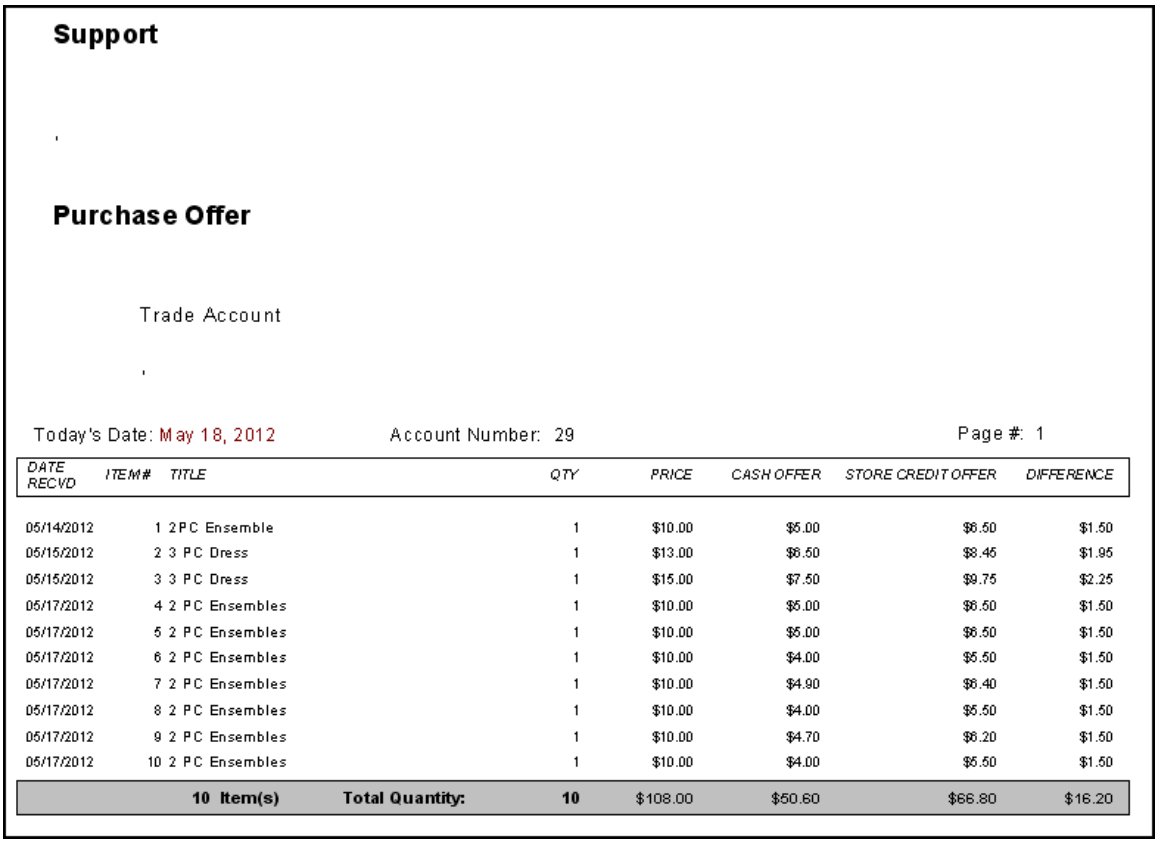
Displays a list of items entered as Trade items and shows the Cash Value, Trade Value, and the Difference between those two values.

When to Use:

Run this report after adding items with the Purchase Method of Trade. This report shows the cash and trade values, allowing the customer to determine which value to use.

Sample Report

To view a sample of the Item List Trade Value Report, click here.



Support

'

Purchase Offer

Trade Account

'

Today's Date: May 18, 2012 Account Number: 29 Page #: 1

DATE RECVD	ITEM#	TITLE	QTY	PRICE	CASH OFFER	STORE CREDIT OFFER	DIFFERENCE
05/14/2012	1	2PC Ensemble	1	$10.00	$5.00	$6.50	$1.50
05/15/2012	2	3 PC Dress	1	$13.00	$6.50	$8.45	$1.95
05/15/2012	3	3 PC Dress	1	$15.00	$7.50	$9.75	$2.25
05/17/2012	4	2 PC Ensembles	1	$10.00	$5.00	$6.50	$1.50
05/17/2012	5	2 PC Ensembles	1	$10.00	$5.00	$6.50	$1.50
05/17/2012	6	2 PC Ensembles	1	$10.00	$4.00	$5.50	$1.50
05/17/2012	7	2 PC Ensembles	1	$10.00	$4.90	$6.40	$1.50
05/17/2012	8	2 PC Ensembles	1	$10.00	$4.00	$5.50	$1.50
05/17/2012	9	2 PC Ensembles	1	$10.00	$4.70	$6.20	$1.50
05/17/2012	10	2 PC Ensembles	1	$10.00	$4.00	$5.50	$1.50
	10	**Item(s)** **Total Quantity:**	**10**	$108.00	$50.60	$66.80	$16.20

Copyright 2010, Resaleworld.com, Inc.

Related Topics

Selecting the Right Report

AUCTION DROP OFF REPORT

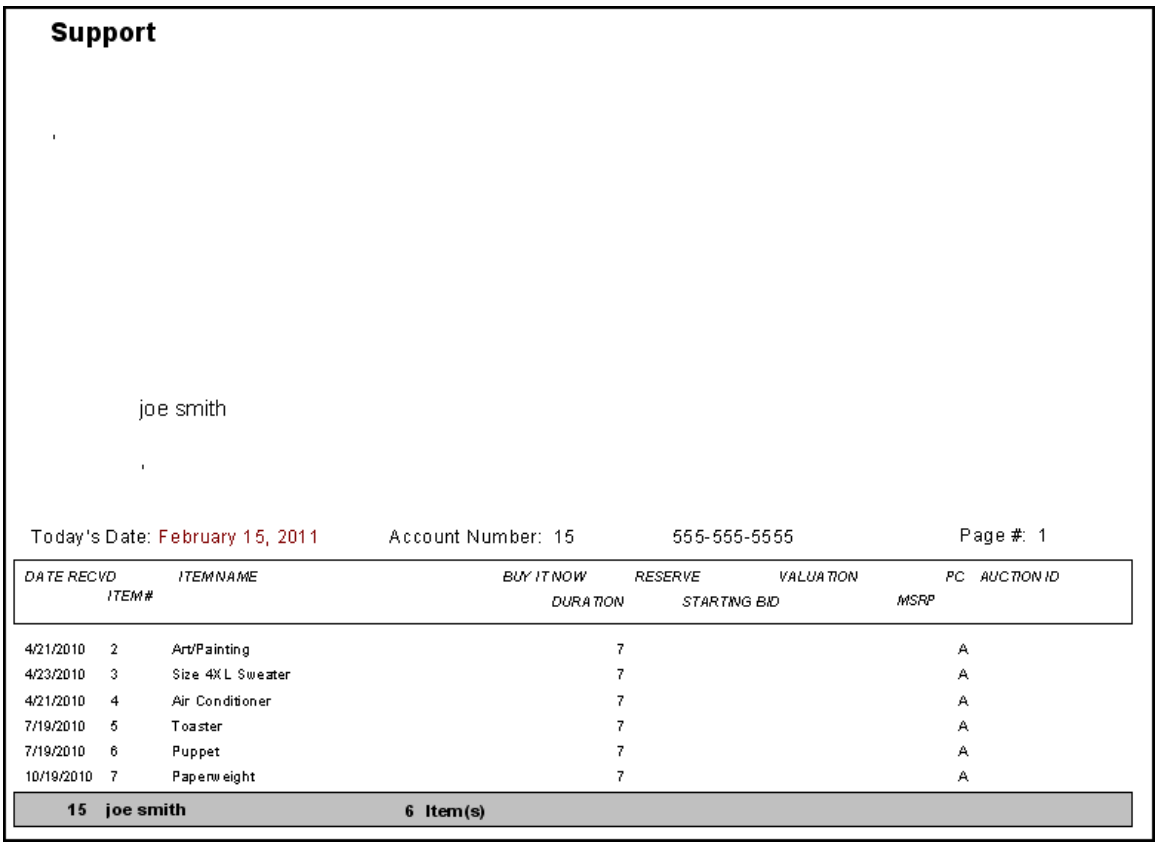
Inventory Module ➔ *Reports* ➔ *Reports* ➔ *Item Lists*

Intended for items brought in to be listed on Ebay. Includes Buy It Now, Duration, Reserve, Starting Bid, Valuation, MSRP, Price Code, Auction ID.

Sample Report

To view a sample of the Auction Drop-off Report, click here.

Copyright 2010, Resaleworld.com, Inc.



Support

joe smith

Today's Date: February 15, 2011 Account Number: 15 555-555-5555 Page #: 1

DATE RECVD	ITEM #	ITEM NAME	BUY IT NOW / DURATION	RESERVE / STARTING BID	VALUATION / MSRP	PC	AUCTION ID
4/21/2010	2	Art/Painting	7			A	
4/23/2010	3	Size 4X L Sweater	7			A	
4/21/2010	4	Air Conditioner	7			A	
7/19/2010	5	Toaster	7			A	
7/19/2010	6	Puppet	7			A	
10/19/2010	7	Paperweight	7			A	
15	**joe smith**	**6 Item(s)**					

Related Topics

Selecting the Right Report

SETTING REPORT PARAMETERS

To pull useful information from your store database, you can use the Parameters section of the Reports dialog box. This section allows you to limit the records that appear in a report. Use the operators from the Operations list box and the Value 1 and Value 2 fields to limit the number of records included in a report. The operators in the Operations list box options are described in the table below.

Copyright 2010, Resaleworld.com, Inc.

OPERATOR	USE TO	EXAMPLE USING THE ITEM HISTORY W/SALES HISTORY REPORT
All	Include all records.	Set all parameters to **All** to view all items in the database.
Blank	Include all records that do not have a value in the selected parameter field.	Set the Item Sold Date Operation field to **Blank** to view all unsold items.
Not Blank	Include all records that have a value in the selected parameter field.	Set the Item Sold Date Operation field to **Not Blank** to view all sold items.
Equals	Include all records that match the value stated in the Value 1 field.	Set the Item Sold Date Value 1 field to **Equal** July 1, 2000 to view all items sold July 1, 2000.
Not Equal To	Include all records that do not match the value stated in the Value 1 field.	Set the Price Code Value 1 field to **Not Equal To** A to view all items that have price codes other than A.
Between	Include all records including and between the values stated in the Value 1 and Value 2 fields.	Set the Date Received Value 1 field to 1/1/2002 and the Value 2 field to 1/31/2002 to show only those sales that occurred in January 2002.

Related Topics

Liberty Reports Overview

PoS Fingertip Reports

PoS Module → *Reports* → *Reports*

Point of Sale provides instant **fingertip** access to five of the most frequently used PoS related reports. They include:

Copyright 2010, Resaleworld.com, Inc.

- End of Day – Payment Summary
- End of Day – Sales Detail
- End of Day – Summary Only
- End of Day – Today's Sales Detail
- Layaway – (Open Only)
- Terminal Detail

To run any of the other reports, close the Fingertip Reports screen, go to Liberty Inventory, then start the Reports Module.

Related Topics

Liberty Reports Overview

Selecting the Right Report

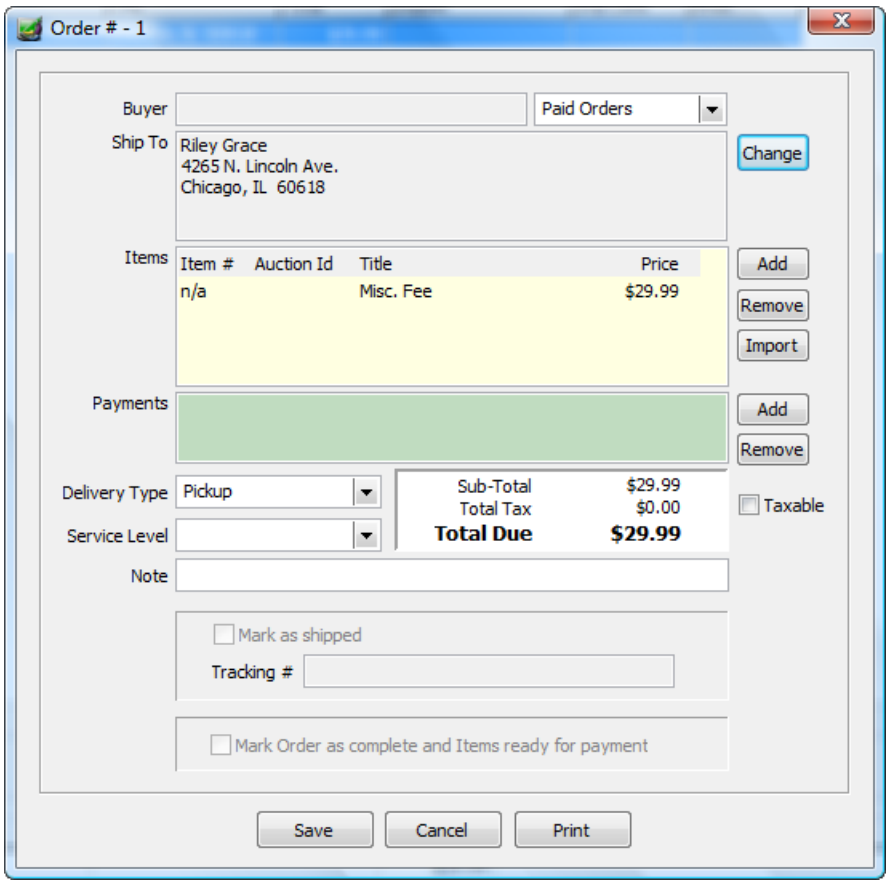
USING REPORTS TO SEND CLIENT EMAILS

Reports Module

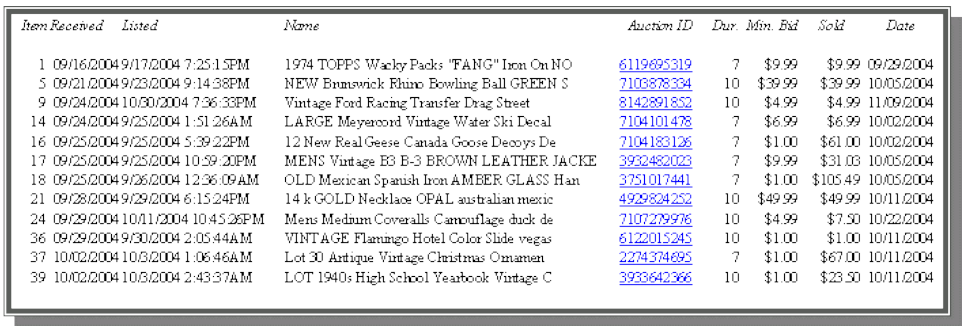
Email is the traditional and most efficient method of communicating with consignors and online customers. Accordingly Liberty provides a variety of tools to automate the process of sending Emails. These include:

1. **Notification Email**. Sent to customers upon the shipment of their order, this email contains the Shipping Date, Service Level (ground, next day air, second day air, etc.), and the Tracking Number. This email is generated in the Order Manager by selecting the Send Notification Email check box located in the New Order dialog:

Copyright 2010, Resaleworld.com, Inc.



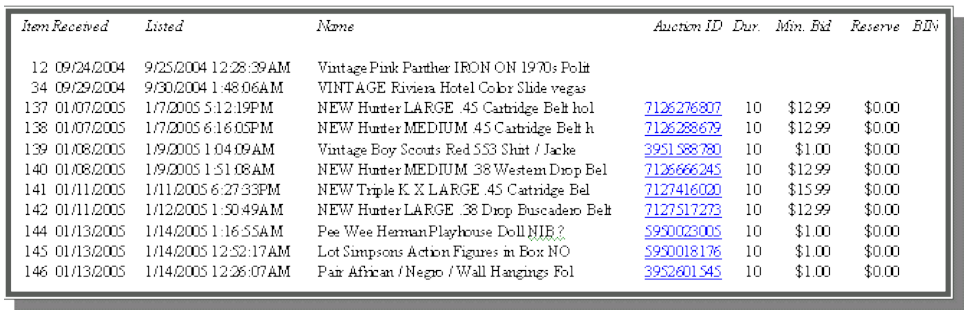
2. **Closed Auction Email**. This report will generate an email to each consignor displaying closed auction information, with a link to the auction. The information is presented in the following format:



Item	Received	Listed	Name	Auction ID	Dur.	Min. Bid	Sold	Date
1	09/16/2004	9/17/2004 7:25:15PM	1974 TOPPS Wacky Packs "FANG" Iron On NO	6119695319	7	$9.99	$9.99	09/29/2004
5	09/21/2004	9/23/2004 9:14:38PM	NEW Brunswick Rhino Bowling Ball GREEN S	7103878334	10	$39.99	$39.99	10/05/2004
9	09/24/2004	10/30/2004 7:36:33PM	Vintage Ford Racing Transfer Drag Street	8142891852	10	$4.99	$4.99	11/09/2004
14	09/24/2004	9/25/2004 1:51:26AM	LARGE Meyercord Vintage Water Ski Decal	7104101478	7	$6.99	$6.99	10/02/2004
16	09/25/2004	9/25/2004 5:39:22PM	12 New Real Geese Canada Goose Decoys De	7104183126	7	$1.00	$61.00	10/02/2004
17	09/25/2004	9/25/2004 10:59:20PM	MENS Vintage B3 B-3 BROWN LEATHER JACKE	3932482023	7	$9.99	$31.03	10/05/2004
18	09/25/2004	9/26/2004 12:36:09AM	OLD Mexican Spanish Iron AMBER GLASS Han	3751017441	7	$1.00	$105.49	10/05/2004
21	09/28/2004	9/29/2004 6:15:24PM	14 k GOLD Necklace OPAL australian mexic	4929824252	10	$49.99	$49.99	10/11/2004
24	09/29/2004	10/11/2004 10:45:26PM	Mens Medium Coveralls Camouflage duck de	7107279976	10	$4.99	$7.50	10/22/2004
36	09/29/2004	9/30/2004 2:05:44AM	VINTAGE Flamingo Hotel Color Slide vegas	6122015245	10	$1.00	$1.00	10/11/2004
37	10/02/2004	10/3/2004 1:06:46AM	Lot 30 Antique Vintage Christmas Ornamen	2274374695	7	$1.00	$67.00	10/11/2004
39	10/02/2004	10/3/2004 2:43:37AM	LOT 1940s High School Yearbook Vintage C	3933642366	10	$1.00	$23.50	10/11/2004

This Email is generated by the Reports module – see Sending Batch Emails to Clients for more details.

3. **Open Auctions Email**. This report will generate an email to each consignor displaying auction information, with a link to the auction. The information is presented in the following format:

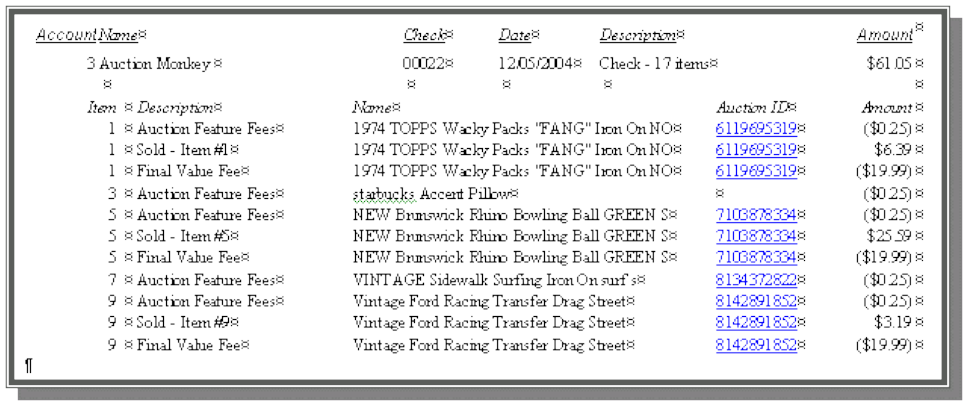


Item	Received	Listed	Name	Auction ID	Dur.	Min. Bid	Reserve	BIN
12	09/24/2004	9/25/2004 12:28:39 AM	Vintage Pink Panther IRON ON 1970s Polit					
34	09/29/2004	9/30/2004 1:48:06 AM	VINTAGE Riviera Hotel Color Slide vegas					
137	01/07/2005	1/7/2005 5:12:19 PM	NEW Hunter LARGE .45 Cartridge Belt hol	7126276807	10	$12.99	$0.00	
138	01/07/2005	1/7/2005 6:16:05 PM	NEW Hunter MEDIUM .45 Cartridge Belt h	7126288679	10	$12.99	$0.00	
139	01/08/2005	1/9/2005 1:04:09 AM	Vintage Boy Scouts Red 553 Shirt / Jacke	3951588780	10	$1.00	$0.00	
140	01/08/2005	1/9/2005 1:51:08 AM	NEW Hunter MEDIUM .38 Western Drop Bel	7126666245	10	$12.99	$0.00	
141	01/11/2005	1/11/2005 6:27:33 PM	NEW Triple K X LARGE .45 Cartridge Bel	7127416020	10	$15.99	$0.00	
142	01/11/2005	1/12/2005 1:50:49 AM	NEW Hunter LARGE .38 Drop Buscadero Belt	7127517273	10	$12.99	$0.00	
144	01/13/2005	1/14/2005 1:16:55 AM	Pee Wee Herman Playhouse Doll NIB ?	5950023005	10	$1.00	$0.00	
145	01/13/2005	1/14/2005 12:52:17 AM	Lot Simpsons Action Figures in Box NO	5950018176	10	$1.00	$0.00	
146	01/13/2005	1/14/2005 12:26:07 AM	Pair African / Negro / Wall Hangings Fol	3952601545	10	$1.00	$0.00	

This Email is generated by the Reports module – see Sending Batch Emails to Clients for more details.

4. **Open Orders Email**. Use this email when you need to remind customers that they have not paid for their orders. Be sure to filter this report so that you do not send every customer an email. This Email is generated by the Reports module – see Sending Batch Emails to Clients for more details.

5. **Payout Detail Email**. Emails payout and payout detail to each consignor. Information in the email is grouped by payout numbers. The information is presented in the following format:



Account	Name	Check	Date	Description	Amount
3	Auction Monkey	00022	12/05/2004	Check - 17 items	$61.05

Item	Description	Name	Auction ID	Amount
1	Auction Feature Fees	1974 TOPPS Wacky Packs "FANG" Iron On NO	6119695319	($0.25)
1	Sold - Item #1	1974 TOPPS Wacky Packs "FANG" Iron On NO	6119695319	$6.39
1	Final Value Fee	1974 TOPPS Wacky Packs "FANG" Iron On NO	6119695319	($19.99)
3	Auction Feature Fees	starbucks Accent Pillow		($0.25)
5	Auction Feature Fees	NEW Brunswick Rhino Bowling Ball GREEN S	7103878334	($0.25)
5	Sold - Item #5	NEW Brunswick Rhino Bowling Ball GREEN S	7103878334	$25.59
5	Final Value Fee	NEW Brunswick Rhino Bowling Ball GREEN S	7103878334	($19.99)
7	Auction Feature Fees	VINTAGE Sidewalk Surfing Iron On surf s	8134372822	($0.25)
9	Auction Feature Fees	Vintage Ford Racing Transfer Drag Street	8142891852	($0.25)
9	Sold - Item #9	Vintage Ford Racing Transfer Drag Street	8142891852	$3.19
9	Final Value Fee	Vintage Ford Racing Transfer Drag Street	8142891852	($19.99)

This Email is generated by the Reports module – see Sending Batch Emails to Clients for more details.

6. **Transaction History Email**. Emails a list of all open transactions to each consignor. (An open transaction is one where the transaction has not yet been included in the calculation of a payout to the consignor.) The information is presented in the following format:

Copyright 2010, Resaleworld.com, Inc.

Date	Transaction	Description	Auction ID	Amount
12/08/2004	Auction Feature Fees	Other	6119695319	($3.00)
12/08/2004	Listing Fee	Other	6119695319	($5.00)
12/08/2004	Listing Fee	Other	6119695319	($5.00)
12/08/2004	Auction Feature Fees	Other	7103878334	($1.00)
12/08/2004	Listing Fee	Other	7103878334	($5.00)

This Email is generated by the Reports module – see Sending Batch Emails to Clients for more details.

***Note**: Before automated emails may be sent, go to **Tools** → **Ecommerce Options** → **Email Settings** and perform the following steps:*

*1. Specify the **Outgoing (SMTP) Mail Server**.*

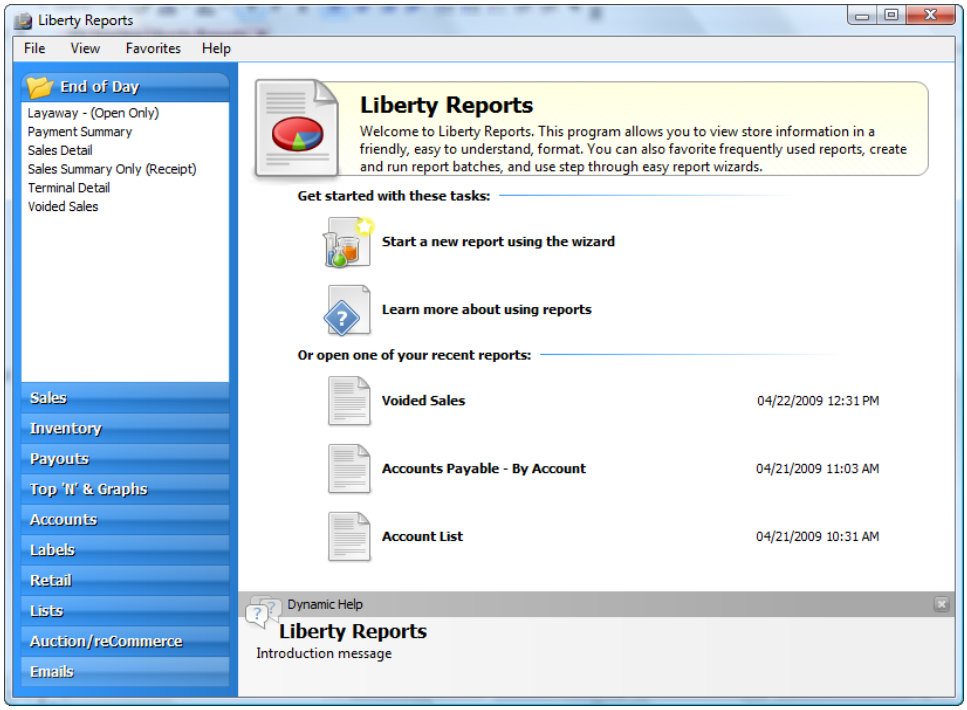
*2. If required by your ISP check the **My Server Requires me to Login** check box and enter a User Name and Password.*

*3. Customize the **Email Headers and Footers** to show relevant information at the beginning and end of each email.*

To Send a Batch of Emails to Customers and/or Consignors:

1. Start the **Reports Module**. Do this by either selecting **Reports** → **Reports** from the Main Menu in Liberty, or selecting **Start** → **Programs** → **Liberty4 Consignment** → **Liberty Reports Module**. The Reports Module will display:

Copyright 2010, Resaleworld.com, Inc.


Liberty Reports
File View Favorites Help
End of Day
Layaway - (Open Only)
Payment Summary
Sales Detail
Sales Summary Only (Receipt)
Terminal Detail
Voided Sales
Sales
Inventory
Payouts
Top 'N' & Graphs
Accounts
Labels
Retail
Lists
Auction/reCommerce
Emails
Liberty Reports
Welcome to Liberty Reports. This program allows you to view store information in a friendly, easy to understand, format. You can also favorite frequently used reports, create and run report batches, and use step through easy report wizards.
Get started with these tasks:
Start a new report using the wizard
Learn more about using reports
Or open one of your recent reports:
Voided Sales 04/22/2009 12:31 PM
Accounts Payable - By Account 04/21/2009 11:03 AM
Account List 04/21/2009 10:31 AM
Dynamic Help
Liberty Reports
Introduction message

2. In the upper left quadrant, under **Report Category**, select **Emails**.
3. In the lower left quadrant, under **Report Name**, select the desired Email Report.
4. In the upper right quadrant, select the appropriate filters to restrict the generation of emails to the desired customers or consignors.
5. If desired, select the Preview button to review the Email(s).
6. Select the **Send** button to send the Email(s).

Related Topics

Liberty Reports Overview

Sending Automated Emails with the Event Manager

PRINTING REPORTS

Inventory Module → *Reports* → *Reports*

After you select the report's parameters and options you will wish to Preview and/or Print the report.

To Preview a Report:

1. Select the **Preview** button.

> ***Note**: You must first close the Print Preview window before changing any report parameters or running another report.*

To Print a Report After Previewing:

1. Select the **Printer** icon at the top of the screen.
2. Select the pages and number of copies you wish to print, then select **OK**.

To Print a Report:

1. Select the **Print** button.

To Export Report Data

1. **Preview** the report.
2. Select the **Export** button (the envelope with the downward pointing arrow)
3. Select the file format in the **Format** drop-down list (comma separated values, Excel, ODBC, Crystal reports, RTF, etc.).
4. Select the destination of the file in the **Destination** drop-down list (in most circumstances select **Disk File**).
5. Select **OK**.
6. Choose the number and date format in the **Number and Date Format** dialog. Click **OK**.
7. Specify the export file name and destination in the **Choose Export File** dialog.
8. Select **Save**.

Related Topics

Liberty Reports Overview

Select Printers & Printing Defaults

Copyright 2010, Resaleworld.com, Inc.

SET REPORT OPTIONS & COLORS

Inventory Module ➔ *Reports* ➔ *Reports*

Report Options will help you reduce the amount of detail included in a report:

OPTION	USE TO
Suppress Detail	Include totals only and no record details. Shown in light blue in the figure below.
Suppress Group Header	Removes group heading from report. Shown in light green in the figure below.
Suppress Group Footer	Removed group summary information. Shown in light yellow in the figure below.
New Page After Group	Start printing on a new page when a new record group starts.
Preview SQL Statement	For use by technical support.

The **Color Selection** options let you set areas of the report to different colors. Click on the button for the area you want to select a color for and select the desired color.

Related Topics

Liberty Reports Overview

Printing Reports

Copyright 2010, Resaleworld.com, Inc.

PRINT MAILING LABELS

Reports Module ➔ *Labels*

The ability to print mailing labels from Liberty Reports makes it a snap to advertise via direct mail. The mailing label feature is found in Liberty Reports.

To Create Mailing Labels:

1. In Liberty Reports, select **Labels** from the Report Category list.
2. Select the type of labels you wish to print from the Report Name list.
3. Select parameters to limit records included.

   Examples:

   To print labels for Clients who have brought inventory to your store, use the **Last Date Item Added** parameter. For instance, if today is June 30, 2002 and you wish to print labels for all Clients who have brought inventory to the store in the last 3 years, choose the **Greater Than Operator** and enter 06/30/1999 in the **Value** field.

   To print labels for Customers only, use the **Last Purchase Date** parameter. For instance, if today's date is July 13, 2002 and you wish to print labels for Clients who last made a purchase over one year ago, choose the **Less Than Operator** and enter 07/13/2001 in the **Value** field.
4. Click on the **Print Preview** button to verify you have set up the report you need.
5. Click on the **Print** button to print the report, or
6. Select the **Export** button to export the list to a file. Exporting to a file allows you to take the list to a mailing house where the labels can be printed, or the addresses printed directly on the mailers.

Related Topics

Liberty Reports Overview

Copyright 2010, Resaleworld.com, Inc.

Word Processor

Copyright 2010, Resaleworld.com, Inc.

WORD PROCESSOR OVERVIEW

Word Processor ➔ *Select Letter*

The Word Processor is used to create single documents such as letters, memos, and faxes. It can also be used to create Form letters and postcards. These help increase sales by sending personalized advertisements and announcements to existing customers and consignors.

Another use for the Word Processor is to create consignment contracts. These contracts can be designed in the same way as a form letter so that the consignor's name and address automatically print as part of the contract.

In this section we will cover:

- Creating a new letter in the word processor
- Editing letters
- Merging information into letters
- Printing word processor letters

Related Topics

Create a New Letter

Editing Letters

Merging Information Into Letters

Printing Letters

CREATE A NEW LETTER

Inventory Module ➔ Word Processor Button

Whenever you create a letter, postcard, contract, memo, etc. in the Word Processor it is referred to as a letter.

To Create a New Letter

1. Click on the **Word Processor** icon at the top of the screen in the Inventory Module, or select **Start ➔ Programs ➔ Liberty ➔ Word Processor**. The **Select Report** dialog will appear.
2. Select the **New** button.
3. Type the name you wish to give to the new file, then click **OK**. The Word Processing dialog will appear. See the next section on Editing Letters for details on using the Word Processing dialog.

Related Topics

Word Processor Overview

Editing Letters

Merging Information Into Letters

Printing Letters

Print Merged Letters from Client Accounts

MERGING INFORMATION INTO LETTERS

Inventory Module ➔ Word Processor Button

Use the **Merge** feature to combine data such as names and addresses from Liberty's client account database with information contained in Word Processor letters. For example you could use Merge to send the same letter to multiple persons, with each letter personalized letter with the individual's name and address.

To show how to use the merge feature, we'll use the following step by step example in which we create a form letter.

Create a Form Letter:

1. Start the Word Processor.
2. Select **New** from the Select Report dialog, enter a name, then press <Enter>. The Word Processor will open with a blank letter.
3. Select **Insert** on the menu, then **Date and Time**. Select one of the dates shown in the Date and Time dialog that displays then click the **OK** button. The date will appear at the top of the letter.
4. Press <Enter> twice to insert two lines between the Date and the text about to be entered. Select **Insert** on the menu, then **Merge** Field. The **Merge** dialog will appear, giving you a choice of a many different fields inLiberty4 to merge.
5. Click once on **First Name**, then click the **OK** button. [[First Name]] will appear in the letter. (If you prefer, you may type the Merge field into the text of your file as long as the format is perfect. In other words, typing [[CITY]] would work, but typing CITY without the brackets would not work.)
6. Press the <Space Bar> once. Select **Insert → Merge Field** again (try doing this by typing a <Ctrl> + N), click on **Last Name**, then click on the **OK** button.
7. Press <Enter> to go down to the next line. Select **Insert → Merge Field**, click on **Address 1**, then click **OK**.
8. Press <Enter> to go down to the next line. Select **Insert → Merge Field**, click on **City**, then on **OK**.
9. Type a comma, then a space. Select **Insert → Merge Field**, click on **State**, then on **OK**.
10. Type a space. Select **Insert → Merge Field**, click on **Zip**, then on **OK**.
11. Press <Enter> twice. Type a short letter.
12. When finished, select **File → Save**. This saves the letter for future use.
13. Select **File → Exit**. This closes the Word Processor.
14. Lookup any client account. Click the **Print** button on the Consignor dialog (which shows the consignor's name, address, phone, etc.). The **Select Report** dialog will appear.
15. Click on the letter you just created, then click **Preview**. Notice how the consignor's name, address, city, state, and zip code were filled in automatically for you. This is what

Copyright 2010, Resaleworld.com, Inc.

merging fields does for you! You can do this for postcards, letters, contracts… anything you wish.

Related Topics

Word Processor Overview

Create a New Letter

Editing Letters

Printing Letters

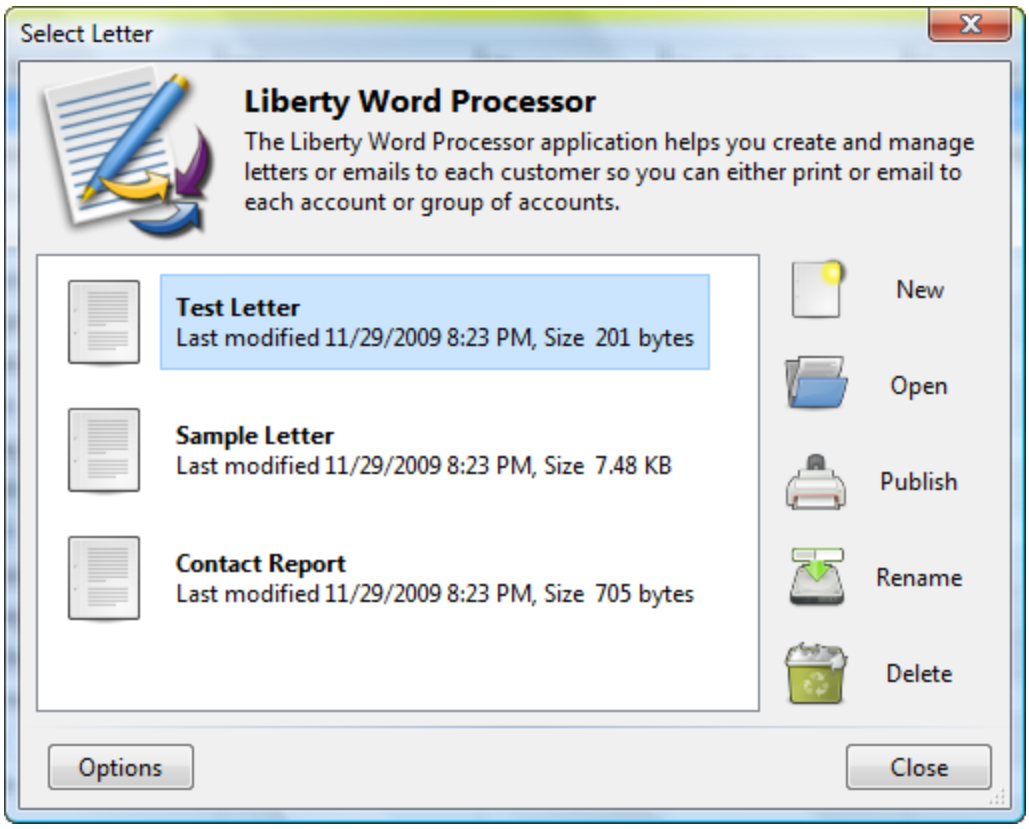
Print Merged Letters from Client Accounts

EDITING LETTERS

Inventory Module ➔ *Word Processor Button*

To Edit a Letter

1. Open the letter in the Word Processor by selecting **Start** ➔ **Programs** ➔ **Liberty** ➔ **Word Processor**. The **Select Letter** dialog will display.


Select Letter
Liberty Word Processor
The Liberty Word Processor application helps you create and manage letters or emails to each customer so you can either print or email to each account or group of accounts.
Test Letter
Last modified 11/29/2009 8:23 PM, Size 201 bytes
Sample Letter
Last modified 11/29/2009 8:23 PM, Size 7.48 KB
Contact Report
Last modified 11/29/2009 8:23 PM, Size 705 bytes
New
Open
Publish
Rename
Delete
Options
Close

2. Highlight the letter to be edited, then select the **Modify** button. The Word Processing dialog will appear with the selected letter open.
3. Type the information you wish into the letter using the various tools provided on the menu. Note that many of the most frequently used menu options also appear on the **Button Bar**.

> ***Note:*** *Fly-over* ***Help*** *is available to help decipher what the various buttons represent. Position the mouse cursor for a second or two over a button and a small caption will appear telling you what the button represents. >*

Following are descriptions of the various menu options contained in the Word Processor. Note that many of the menu options have keyboard shortcuts. For instance, **File - New** uses **<Ctrl> <N>.**

- **New**. Select New to create a new letter.
- **Open**. Select Open to edit an existing letter.
- **Save**. Saves the letter that is currently open.
- **Print**. Prints the letter.
- **Email Letters**. Allows you to email the letter using your default email software. Upon

selecting this option, enter the parameters for the various filters, then click the Print button. Give the email a subject line in the following dialog.

- **Adjust Margins**. Allows you to change the top, bottom, left and right margins in 1/2 inch increments.
- **Import File**. This option allows you to open a file that was created outside of Liberty. Files must be in ASCII Text format (.txt) or Rich Text Format (.rtf).
- **Exit**. Closes the Word Processor and the letter you are editing without saving any changes.
- **Undo**. Reverses the most recent action taken. For instance, if you delete a paragraph, then immediately change your mind, select Undo to put the paragraph.
- **Cut**. Copies the selected text to the clipboard. (Text can also be cut and copied from other programs.) Caution: When you cut text, the original text is deleted from the letter.
- **Copy**. Copies the selected text to the clipboard. (Text can also be cut and copied from other programs.) Unlike Cut, the original text is NOT deleted.
- **Paste**. Inserts the contents of the clipboard to where the cursor is currently positioned. Use this after text has either been cut or copied. Text may be cut or copied from another program and pasted into your Liberty letter.
- **Select All**. Highlights all text in the letter. You can also select portions of text by left click and dragging the mouse over the text.
- **Find**. Use this to find a word or phrase in the letter.
- **Find Next**. Use this to find the next occurrence of a word or phrase in the letter.
- **Replace**. Use this to find and replace text in one step.
- **Insert Date (and Time)**. Inserts today's date and, optionally, time. A variety of formats are provided.
- **Merge Field**. Inserts a merged field in the letter.
- **Font**. Brings up Windows Font dialog, with which you can choose between various fonts (styles of type), type sizes (pitch), and other text features.
- **Bold**. Takes currently selected text and makes it bold. To select text, either a) left click and drag the cursor over the text so that it is highlighted, or b) place the cursor at the beginning of the text you wish to select, press the <Shift> key, then press the <Right Arrow> key. (Try using the other arrow keys, as well as the <Home> and <End> keys and watch what happens. Also try holding down the <Shift> key and the <Ctrl> key at the same time as you press any of the <Arrow> keys.)
- **Italics**. Takes the currently selected text and italicizes it.
- **Underline**. Takes the currently selected text and underlines it.

Copyright 2010, Resaleworld.com, Inc.

Related Topics

Word Processor Overview

Create a New Letter

Merging Information Into Letters

Printing Letters

Print Merged Letters from Client Accounts

PRINTING LETTERS

Inventory Module → Word Processor Button

Letters may be printed from within the Word Processor or from within a client's file. In both cases any merge fields used in the letter will be merged into the letter(s) being printed.

When printing the same letter for many clients (for instance, a form letter), use the print routine contained in the Word Processor.

When printing a single letter for a particular client, use the print routine located in the client files. This is done by looking up the client then selecting the Print button from the client's display (which contains the client's name, address, phone, etc.).

To Print from Within the Word Processor:

1. Start the Word Processor.
2. Highlight the letter to be printed from the **Select Letter** dialog and click on the **Modify** button. The letter will appear on screen.
3. With the letter to be printed on screen, select **File → Print**.
4. Select the range of Account Numbers, Last Names, etc. for which the letter is to be printed.

Copyright 2010, Resaleworld.com, Inc.

5. Select whether to sort by account number or last name.
6. Select the **Print** button.

To Print a Letter from Within a Client's File:

1. Lookup the client's account.
2. Select **Task** → **Print** → **Letters**.
3. The Select Report dialog will appear. Click the letter you wish to print so that it is highlighted.
4. Select Preview to look at that letter before printing, or Print to immediately print the letter.

   If the letter contains merged fields, information from the file you originally looked up is entered into these merged fields. For instance, if the letter being printed contains the first name and last name merge fields, and you looked up Anne Jones account, then **Anne** and **Jones** will appear in the letter when it is printed.

Note: *If you are not merging information, you might also try using WordPad. WordPad is a simple word processor which is included in Windows, and contains a few features that Liberty's word processor does not. If you are looking for a lot more sophistication, try using Microsoft Word or Corel WordPerfect.*

Related Topics

Select Printers & Printing Defaults

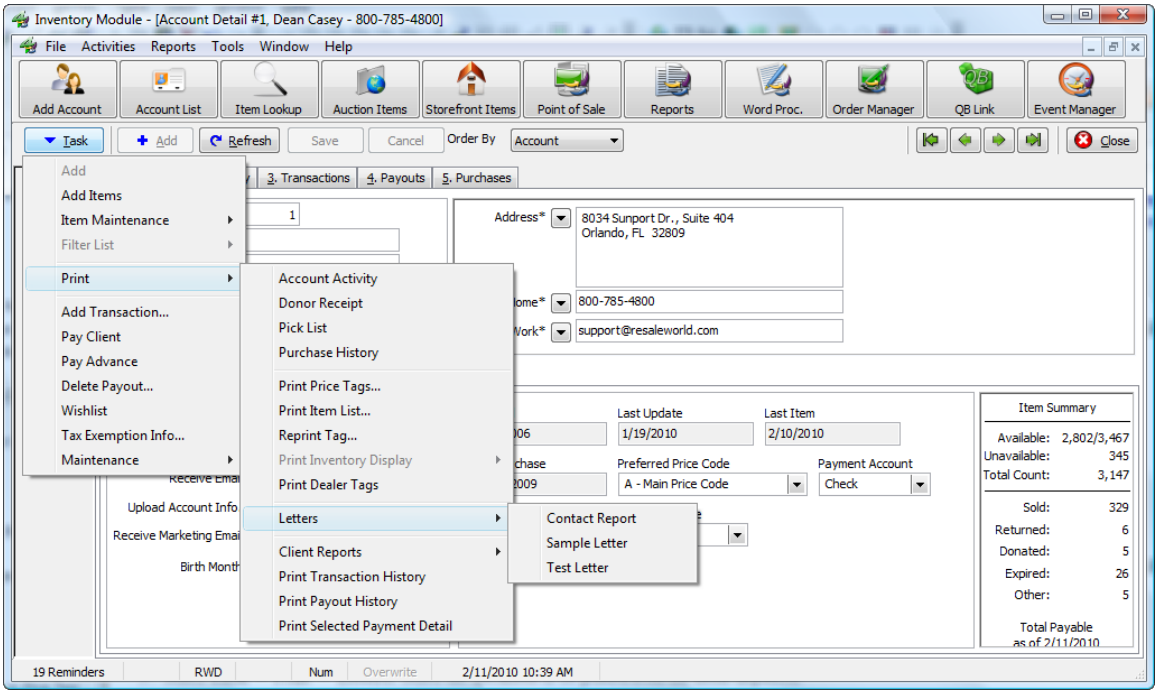
Print or Email Merged Letters from Client Accounts

Inventory Module → *Task* → *Print* → *Letters*

Documents (letters) created using the **Word Processor** are by default stored in the RWD\Letters folder. The Print Letters menu dynamically changes to list all documents in this

folder. This allows customized documents to be merged with client information such as the client's name, address, etc.

Example: Let's say you wish to occasionally send thank you letters to your best clients. Using the Word Processor, you create a standardized letter for this purpose, complete with Merge Codes to insert the client's name, address, etc. into the letter. When the time comes to print such a letter, the Print Letters routine will allow you to quickly print the letter.



To Print a Merged Letter:

1. Use the Word Processor to create the letter or document. When you do you will give a name to the document. The document will be stored in the RWD\Letters folder, and will appear in the menu which appears when step 3 below is performed.
2. Lookup the client for whom you wish to print a letter or document.
3. Select **Task** → **Print** → **Letters**. Select the document to be printed from the menu displayed.
4. Select your **Printer** and click **OK**.

Related Topics

Email Merged Letters from Client Accounts

Word Processor Overview

Merging Information Into Letters

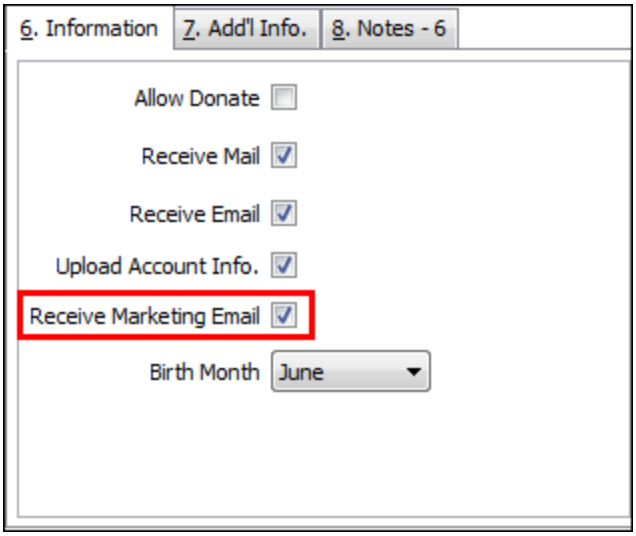
EMAIL MERGED LETTERS FROM CLIENT ACCOUNTS

Word Processor → *File* → *Publish* → *Email*

Documents (letters) created using the **Word Processor** can be emailed to one or more customers. You can also enter filter criteria to narrow the recipients list based on a variety of fields.

Letters created in the Word Processor can contain images inserted by selecting **Insert > Picture**. When sending these letters through Liberty as emails, they are sent as HTML emails meaning that Resaleworld hosts the images for the user rather than attaching them to the email.

Please note that only clients whose accounts are set to **Receive Marketing Email** can appear on the list of accounts in the Word Processor. This setting can be found on the Account Detail screen on the 6. Information tab.

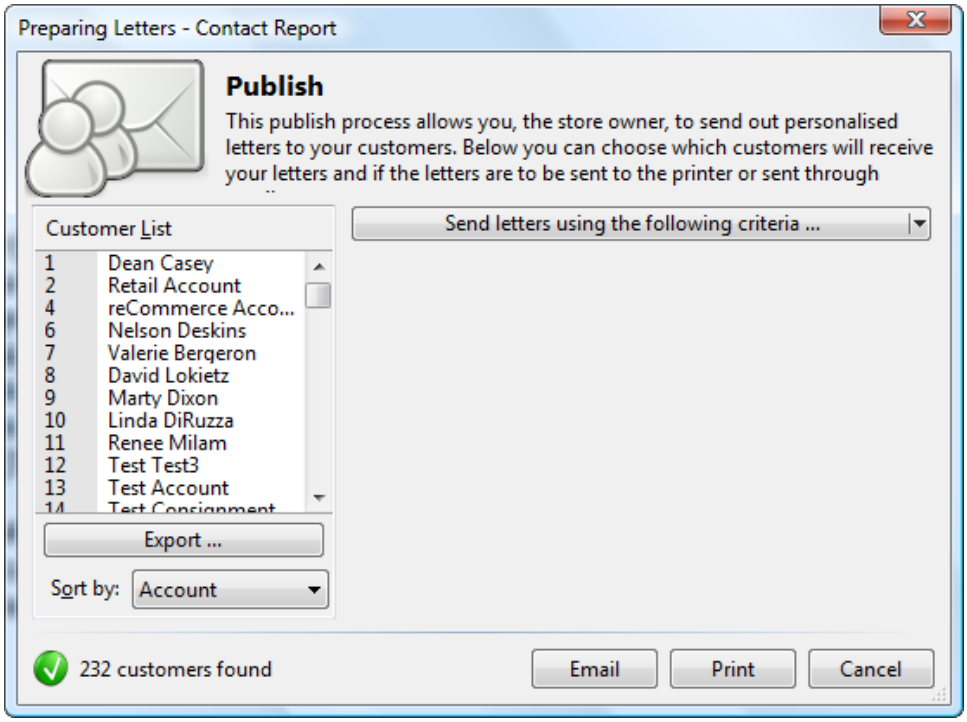


The account must also have an email address on file to receive emails from the Word Processor.

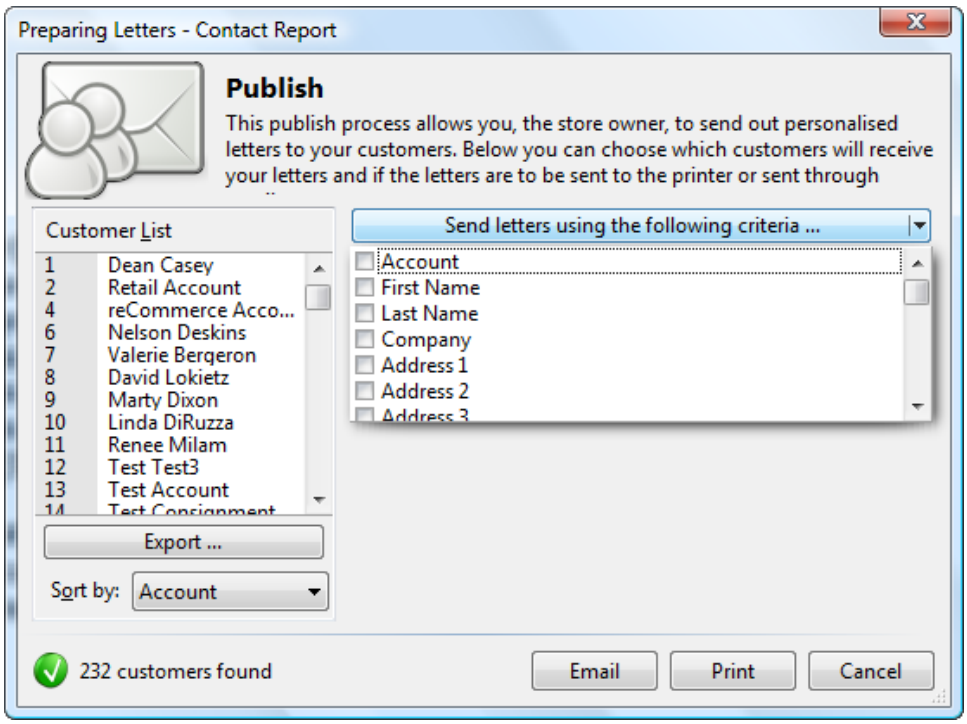
Copyright 2010, Resaleworld.com, Inc.

To Email a Merged Letter

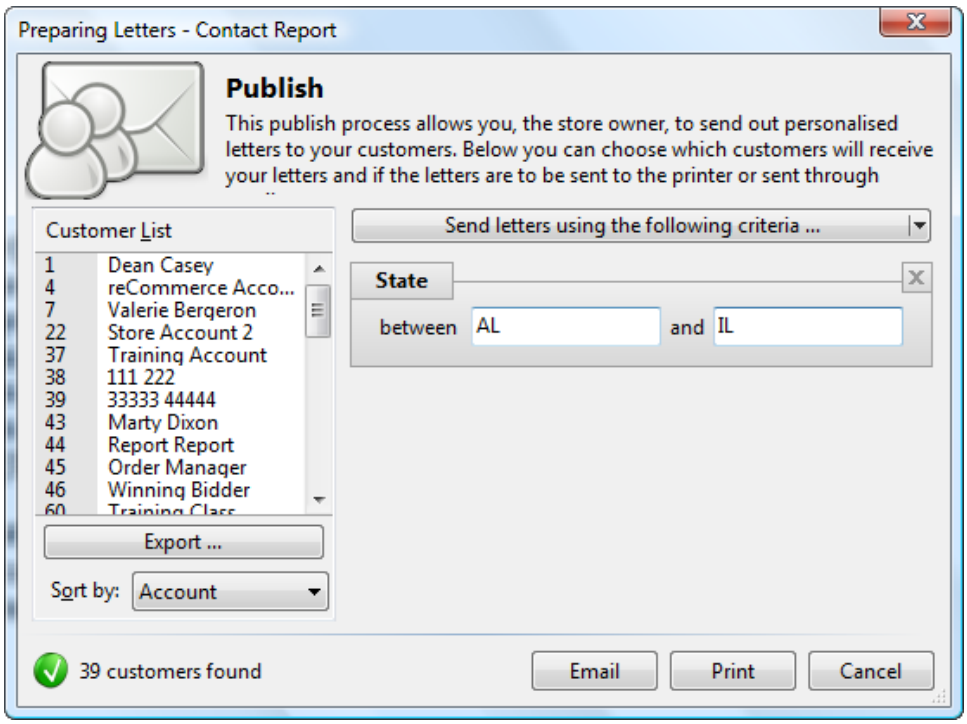
1. Use the Word Processor to create the letter or document.
2. From the **File** menu, select **Publish**. The Preparing Letters dialog displays.


Preparing Letters - Contact Report
Publish
This publish process allows you, the store owner, to send out personalised letters to your customers. Below you can choose which customers will receive your letters and if the letters are to be sent to the printer or sent through
Customer List
Send letters using the following criteria ...
1 Dean Casey
2 Retail Account
4 reCommerce Acco...
6 Nelson Deskins
7 Valerie Bergeron
8 David Lokietz
9 Marty Dixon
10 Linda DiRuzza
11 Renee Milam
12 Test Test3
13 Test Account
Export ...
Sort by: Account
232 customers found
Email
Print
Cancel

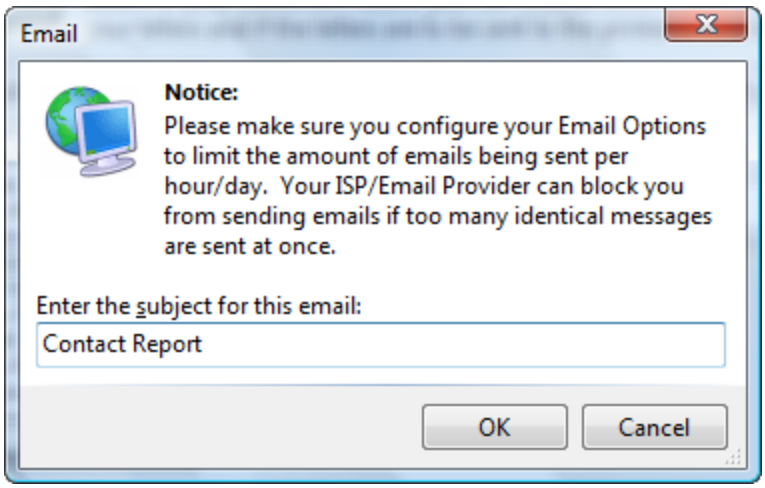
3. The Customer List indicates which accounts will receive this letter.
4. Click the **Send letters using the following criteria** menu to narrow the recipients in the Customer List based on the selected values.



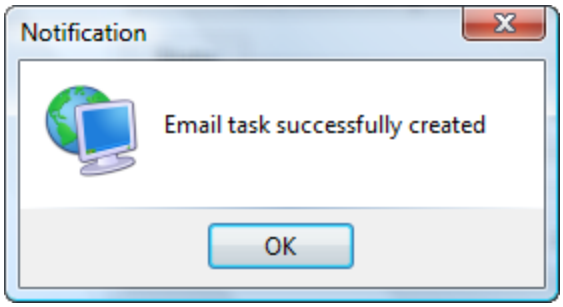
5. Once a criteria has been selected, use the filter fields to narrow the Customer List.


Preparing Letters - Contact Report
Publish
This publish process allows you, the store owner, to send out personalised letters to your customers. Below you can choose which customers will receive your letters and if the letters are to be sent to the printer or sent through
Customer List
1 Dean Casey
4 reCommerce Acco...
7 Valerie Bergeron
22 Store Account 2
37 Training Account
38 111 222
39 33333 44444
43 Marty Dixon
44 Report Report
45 Order Manager
46 Winning Bidder
Export ...
Sort by: Account
Send letters using the following criteria ...
State
between AL and IL
39 customers found
Email
Print
Cancel

6. Click the **Email** button. The Email dialog displays.

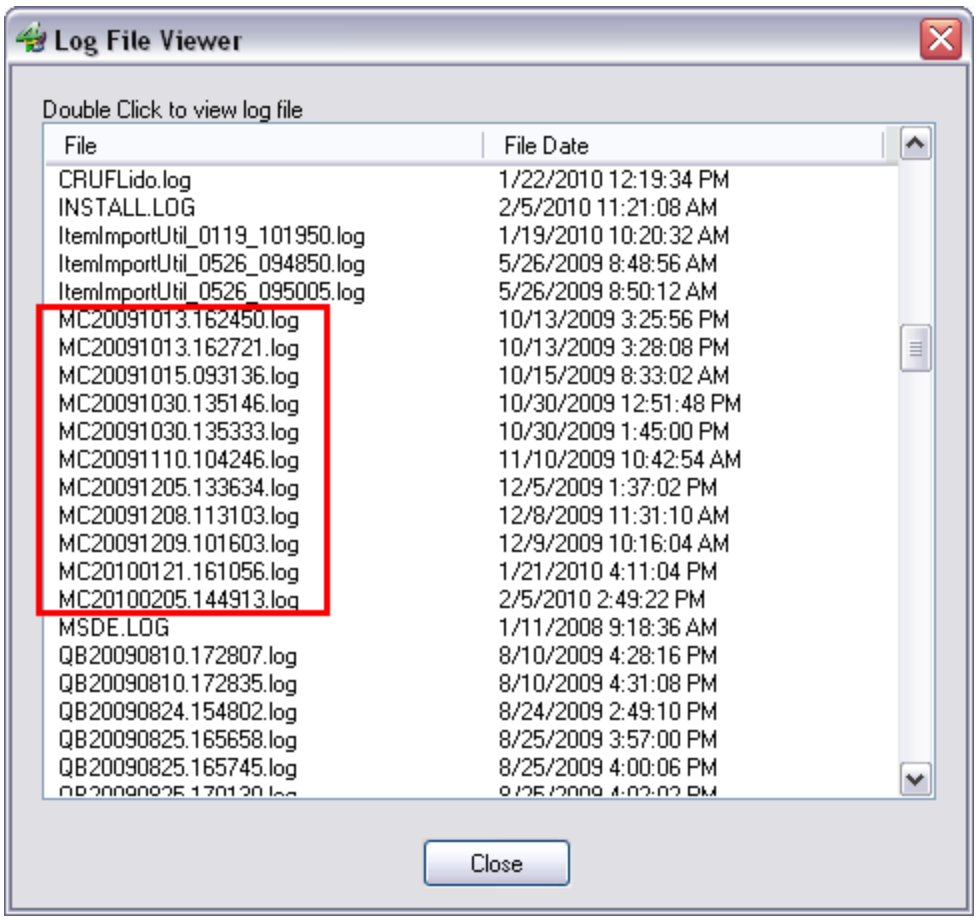

Email
Notice:
Please make sure you configure your Email Options to limit the amount of emails being sent per hour/day. Your ISP/Email Provider can block you from sending emails if too many identical messages are sent at once.
Enter the subject for this email:
Contact Report
OK
Cancel

7. Enter the text you want to display in the subject line of the email being sent.
8. Click **OK**. The letters will be published and sent.
9. The Notification message will let you know when your email has been created. Click **OK** when finished.



10. Emails sent from the Word Processor will appear in a log file that can be viewed from Liberty under **Help > Support > View Log Files**. The log files created by the Word Processor's mail client will start with the letters MC (as well as a date/time stamp).

Copyright 2010, Resaleworld.com, Inc.

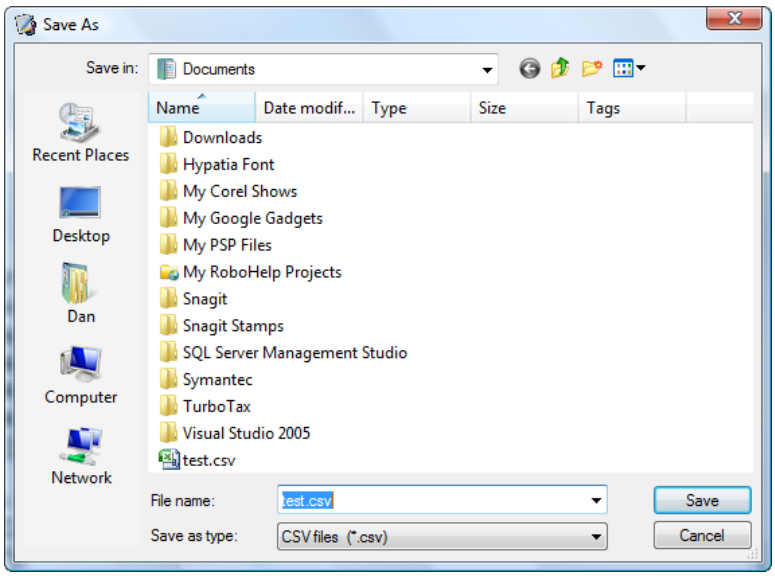


Export Customer List

You can also export the list of accounts from the Customer List selected on the Preparing Letters screen. This allows you to use Liberty to aggregate data (e.g. select customers based on Zip Code or Last Purchase, etc.) and then send the email using another system - such as Constant Contact.

1. Once you have generated the Customer List (as described above), click the Export button.
2. In the **Save As** dialog, choose the location where you want to save the file.

Copyright 2010, Resaleworld.com, Inc.



3. Enter a name for the file and click **Save**.
4. The Customer List is exported as a CSV file, which are typically opened using Microsoft Excel or another spreadsheet application.

Related Topics

Print Merged Letters from Client Accounts

Setting Email Options for Merged Letters

Word Processor Overview

SETTING EMAIL OPTIONS FOR MERGED LETTERS

Word Processor ➔ *Select Letter* ➔ *Options*

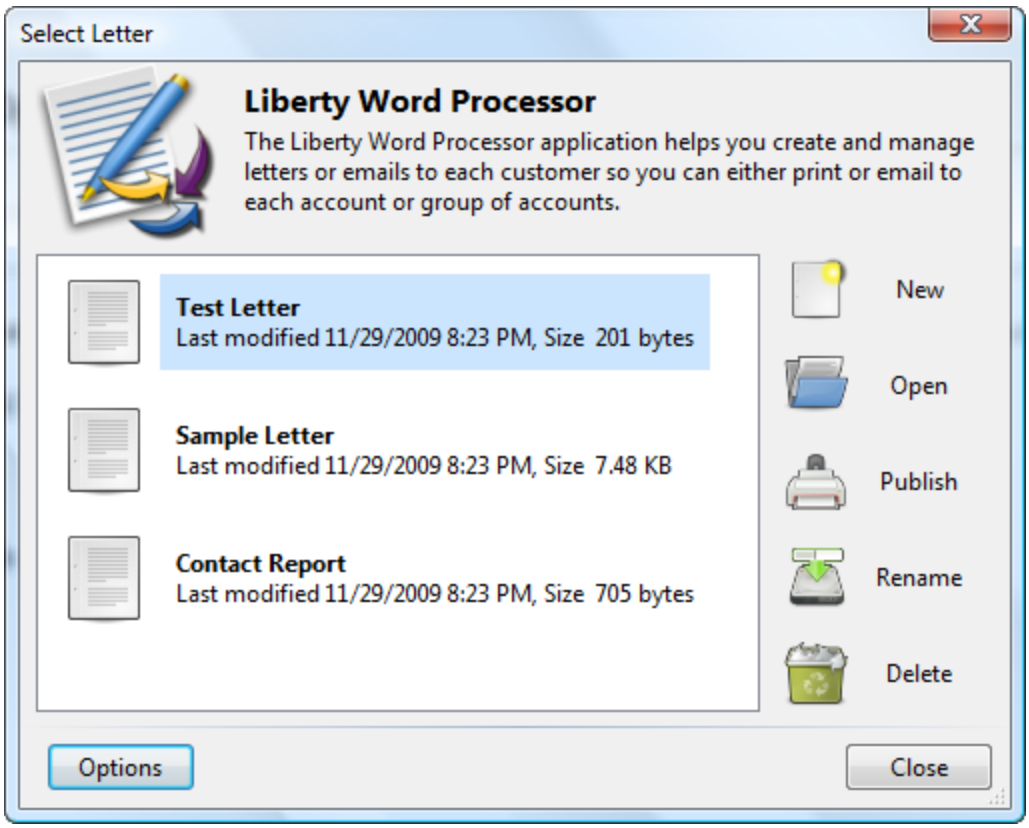
Copyright 2010, Resaleworld.com, Inc.

Documents (letters) created using the **Word Processor** can be emailed to one or more customers. You can set the email options from the Select Letter screen by clicking the Options button.

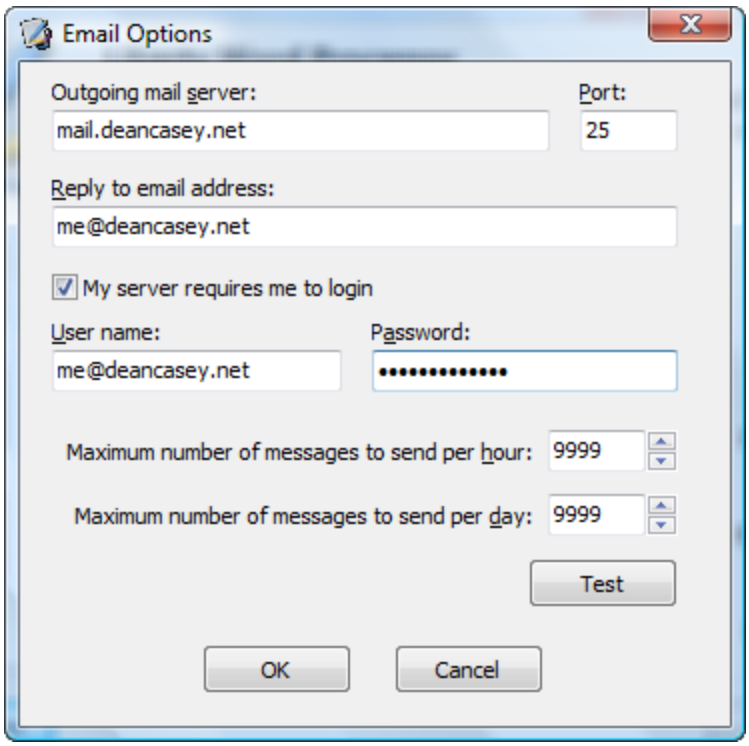
The user needs to obtain their Outgoing mail server, Port, Reply to and server login info from their ISP, email provider or system administrator. This information is specific to each user, so Resaleworld doesn't know settings you need to enter in these fields. For example, the default port is 25, but this varies across different providers so yours may not be.

These settings also allow you to limit the number of emails that are sent out per hour or per day. These fields currently default to 9999. It is important to remember that virtually ALL providers will not allow more than about 100 IDENTICAL/SIMILAR emails go through their system in a 24 hour time period. Identical/similar emails going out in large batches can be treated as spam. The provider will stop/limit emails if they see what they consider to be questionable activity. Again, only the user's ISP/email provider/system admin can verify what these limits will be and what the result will be if the limits are reached.

1. Launch the Word Processor module. The **Select Letter** dialog displays.


Select Letter
Liberty Word Processor
The Liberty Word Processor application helps you create and manage letters or emails to each customer so you can either print or email to each account or group of accounts.
Test Letter
Last modified 11/29/2009 8:23 PM, Size 201 bytes
Sample Letter
Last modified 11/29/2009 8:23 PM, Size 7.48 KB
Contact Report
Last modified 11/29/2009 8:23 PM, Size 705 bytes
New
Open
Publish
Rename
Delete
Options
Close

2. Click the **Options** button. The Email Options dialog displays.



3. Configure your email settings and click the **Test** button.
4. If the test is successful, click **OK** to save your changes and exit. If the test is not successful, enter the information again and click Test again.

Related Topics

Email Merged Letters from Client Accounts

Word Processor Overview

Copyright 2010, Resaleworld.com, Inc.

Appendices

Copyright 2010, Resaleworld.com, Inc.

SYSTEM REQUIREMENTS

	Minimum Requirements	Preferred Specifications & Network Configuration
Computer	**Single User**	**Network**
	Processor: 1 GHz (no Celerons) Memory: 1 GB RAM Hard Drive: 20 GB Monitor/Display: 1024 x 768 resolution	Processor: 2 GHz (no Celerons) Memory: 2 GB+ RAM Hard Drive: 80 GB Monitor/Display: 1024 x 768 resolution
Backup	USB Thumb Drives (512 MB+), CD-RW or DVD-R. **Backups must be performed daily!**	USB Thumb Drives (512 MB+), CD-RW or DVD-R. **Backups must be performed daily!**
Operating System	Windows 2000 Pro, Windows XP Pro or Windows 7 Pro.	Windows 2000 Server, Windows Server 2003 or 2008.
	Note: *We do not recommend Windows 98, ME, Media Center, XP Home, Vista Home or 7 Home. Macs are NOT SUPPORTED!!!*	
Reports Printer (for printing Reports, Lists, Checks, etc.)	Any Ink Jet or Laser printer that will work with your choice of operating system.	
Price Tag Printer	TSC TDP-245 Plus, Zebra LP2844 Direct Thermal Printer or Zebra LP2824. (Available from http://www.resaleworld.com/store)	
	Note: *Do not purchase any other type of thermal printer as it will not work with Liberty.*	
Bar Code	Optional but recommended - especially the bar code reader. (Available from http://www.resaleworld.com/store)	

Copyright 2010, Resaleworld.com, Inc.

Reader, Cash Drawer, & Receipt Printer

Note: *Please do not purchase equipment before checking with Resaleworld for compatibility.*

Uninterruptible Power Supply

Optional but STRONGLY recommended for use with all computers. (For more information see www.apc.com.)

Going Online

Optional but STRONGLY recommended. High-speed Internet access via cable or DSL. Minimum 56K Modem or Faster.

Anti Virus

Optional but STRONGLY recommended. Please view our Message Board at http://forums.resaleworld.com/ for information on recommended anti-virus protection.

Digital Camera

The most recent Canon PowerShot models that can be used with Liberty are the **G10**, **G9**, **SX110 IS**, **SX100 IS** and **S5 IS**.

Please note: The **Canon PowerShot G9** and **Canon PowerShot G10** do not support shooting in raw mode when connected to a PC.

Windows Vista and Windows 7 Support: Now supported by Liberty for recent PowerShot models. The following camera models are supported by Liberty on Windows Vista and Windows 7: A620, A640, S80, S3 IS, S5 IS, SX100 IS, SX110 IS, G7, G9, G10. Older PowerShot models are not supported on Windows Vista or Windows 7.

The PowerShot models listed in the table below are known to work with Liberty on Windows XP:

Pro series	Pro90IS, Pro1
G-series	G1, G2, G3, G5, G6, G7, G9, G10
S-series	S30, S40, S45, S50, S60, S70, S80, S1 IS, S2 IS, S3 IS, S5 IS, SX100 IS, SX110 IS
A-series	A30, A40, A60, A70, A75, A80, A85, A95, A300, A310, A400, A510, A520, A620, A640
Digital IXUS	SD100 (Digital IXUS II), SD110 (Digital IXUS IIs), S230 (Digital IXUS 330), S400 (Digital IXUS 400), S410 (Digital IXUS 430), S500 (Digital IXUS 500)

The following Canon PowerShot cameras **do not** support remote capture operation and therefore will not work with Liberty:

Copyright 2010, Resaleworld.com, Inc.

A series: A410, A420, A430, A450, A460, A470, A480, A490, A495, A530, A540, A550, A560, A570 IS, A580, A590 IS, A610, A630, A650 IS, A700, A710 IS, A720 IS, A1000 IS, A1100 IS, A2000 IS, A2100 IS, A3100 IS

Digital ELPH/IXUS: SD30, SD40, SD400 (Digital IXUS 50), SD430, SD450 (Digital IXUS 55), SD500 (Digital IXUS 700), SD550 (Digital IXUS 750), SD600, SD630, SD700 IS, SD750, SD770 IS, SD780 IS, SD790 IS, SD800 IS, SD850 IS, SD870 IS, SD880 IS, SD890 IS, SD900, SD940 IS, SD950 IS, SD960 IS, SD970 IS, SD980 IS, SD990 IS, SD1000, SD1100 IS, SD1200 IS

SX series: SX200 IS, SX120 IS, SX20 IS, SX10 IS, SX1 IS,

G Series: G11

S Series: S90

Other: TX1, E1, D10

Note: *Resaleworld does not support installation or configuration of digital cameras. It is advantageous to have an understanding of digital photography basics - i.e., image resolution, image sizes, transferring images/files from one place to another, etc.*

Related Topics

Computer Equipment Recommendations (Printers, Bar Code Readers, etc.)

Copyright 2010, Resaleworld.com, Inc.

Computer Equipment Recommendations (Printers, Bar Code Readers, etc.)

Bar Code Reader

CCD or Laser Bar Code Readers are available at highly competitive prices from Resaleworld.

Due to compatibility issues and variations in quality and performance, we recommend purchasing Bar Code Readers only from Resaleworld.

Please contact the Resaleworld Sales Department for more information.

A Note About Printer Ports

Printers are connected to computers with a printer cable. On one end the printer cable plugs into the printer, and on the other end the cable is plugged into the computer. The term for the computer end of the connection is printer **port**.

Printer ports come in two styles – parallel, and USB.

When purchasing your computer system be sure to match up the printer ports with the type of printers you are purchasing. In addition make sure you have sufficient parallel and/or USB printer ports for the printers you intend to use.

Price Tag Printer

We recommend using a Direct Thermal printer for printing price tags, because thermal price tags are the fastest printing and most professional in appearance. Direct thermal printers are available at highly competitive prices from Resaleworld.

Due to compatibility issues and variations in quality and performance, we do not recommend purchasing Direct Thermal printers from other companies.

Please contact the Resaleworld Sales Department for more information.

Copyright 2010, Resaleworld.com, Inc.

Check Printer

Any Windows compatible ink jet or laser printer should (but cannot be guaranteed to) work with Liberty to print checks.

Reports Printer

Any Windows compatible ink jet or laser printer should (but cannot be guaranteed to) work with Liberty to print reports.

Point of Sale Receipt Printer

Point of Sale (PoS) Receipt printers are available at highly competitive prices from Resaleworld.

Due to compatibility issues and variations in quality and performance, we recommend purchasing PoS Receipt printers only from Resaleworld.

Please contact the Resaleworld Sales Department for more information.

Cash Drawer

Cash Drawers are available at highly competitive prices from Resaleworld. These cash drawers may connect to the PoS Receipt Printer so as to open automatically at the appropriate time as each sale is transacted.

Due to compatibility issues and variations in quality and performance, we recommend purchasing Cash Drawers only from Resaleworld.

Please contact the Resaleworld Sales Department for more information.

Running Multiple Printers on One Computer

To run two or more printers from one computer, the computer must have multiple printer ports. Most printers use **USB** ports, and most computers come with at least two USB ports. If you need to connect more than two USB printers on a particular computer, be sure there are enough USB ports.

If you are using printers that use a parallel port, realize that computers come standard with one parallel port. If you need to connect two parallel printers to a particular computer, a second parallel port must be added. Do not use a Switch Box – Switch Boxes are unreliable and responsible for 30% of the printer problems reported to Resaleworld.

Related Topics

Copyright 2010, Resaleworld.com, Inc.

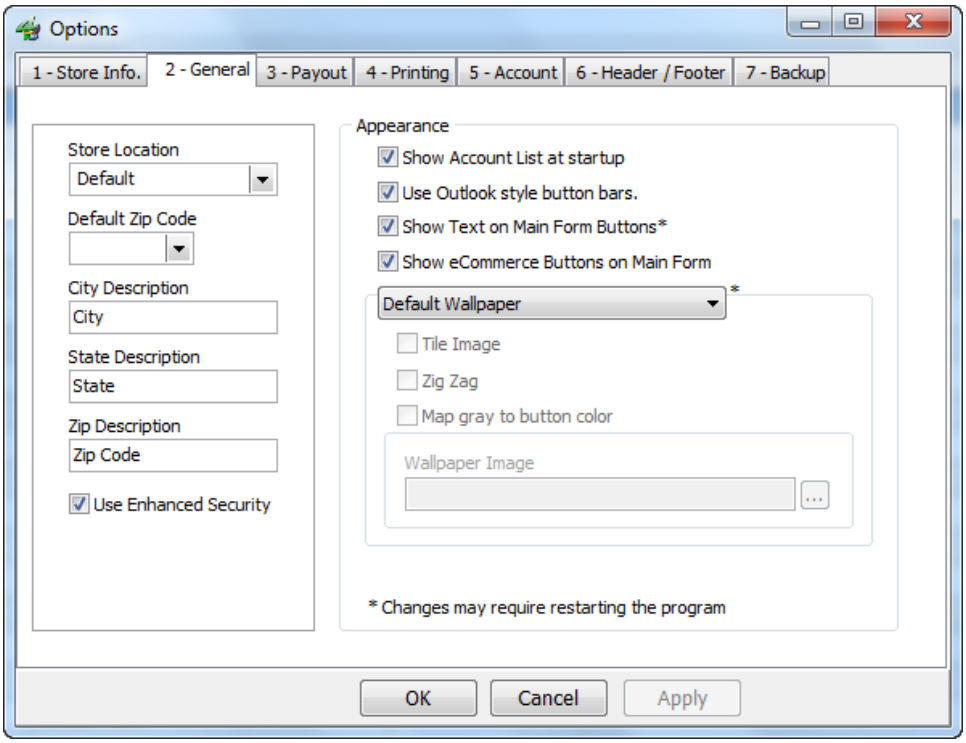
Ordering Computer Equipment from Resaleworld

ENHANCED SECURITY OPTIONS

Inventory Module ➔ Tools ➔ Options ➔ General Tab

Liberty 4 Consignment provides Enhanced Security options on the General tab of the Options dialog. By default, this option is disabled, but can be activated manually by an Administrator using the "Using Enhanced Security" check box (see below).

> ***Note:*** *The Enhanced Security Options will also be activated automatically if Mercury Payment Systems is set as the Credit Card Software from Point of Sale.*



Enabling Enhanced Security will enforce the following security policies:

Username & Password Security

Each user account must have a unique user ID and a password.

New accounts can be created without a password, however, the user will be required to enter a password during their first login.

When Enhanced Security is enabled, the login prompts will no longer have a drop-down arrow to display recently entered usernames.

Administrator Account Security

Passwords for accounts with Administrator access must be at least seven characters long, and must contain at least one character and one number. This password must be changed every 90 days.

If enhanced security is activated, the next time an administrator logs in to any Liberty component, the user will be notified that the password has expired and must be changed. The 90 day period begins on the day the new password is saved.

Liberty maintains a recent password hash history for all Administrator accounts containing the four most recent passwords used.

Administrator accounts will be locked out after six consecutive failed login attempts. The lockout period will last for 30 minutes or until another administrator unlocks that account.

If an Administrator is logged in and remains idle for 15 minutes, they will be forced to re-enter login credentials.

Event Log

The Event Log allows you to view a list of the most recent events for your User ID. The Event Log is never purged, but only the 500 most recent log entries are displayed. Event logging is always on for most events, even if enhanced security is not activated.

For more information on the Event Log, see Event Logging.

Related Topics

Enabling Enhanced Security Options

Copyright 2010, Resaleworld.com, Inc.

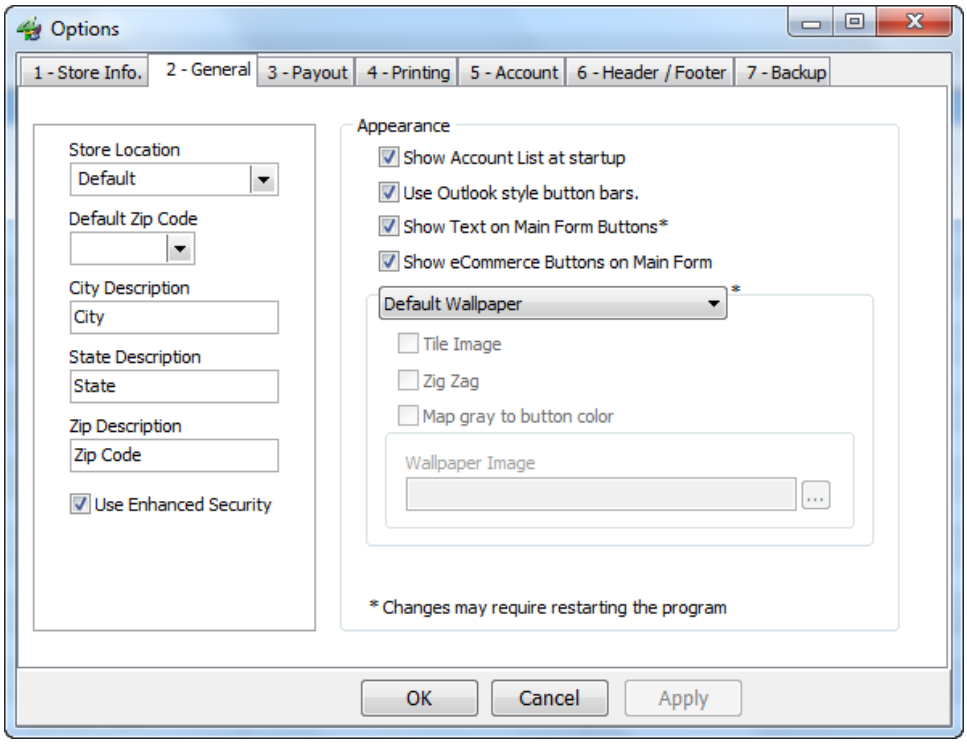
ENABLING ENHANCED SECURITY OPTIONS

Inventory Module ➔ *Tools* ➔ *Options* ➔ *General Tab*

Use this procedure to turn Liberty's enhanced security options on and off. For more information on these options and how they work, click here.

Enabling Enhanced Security Options

1. From Liberty Inventory's main menu, click on **Tools** ➔ **Options**, and then click on the **2 - General** tab. The General Defaults window will display:



2. The **Use Enhanced Security** check box is used to turn the advanced security features on or off. Checking this box will activate the security measures detailed here.

> *Note: This option is disabled by default. However, it will be selected automatically if Mercury Payment Systems is set as the default Credit Card Software in the Point of Sale module.*

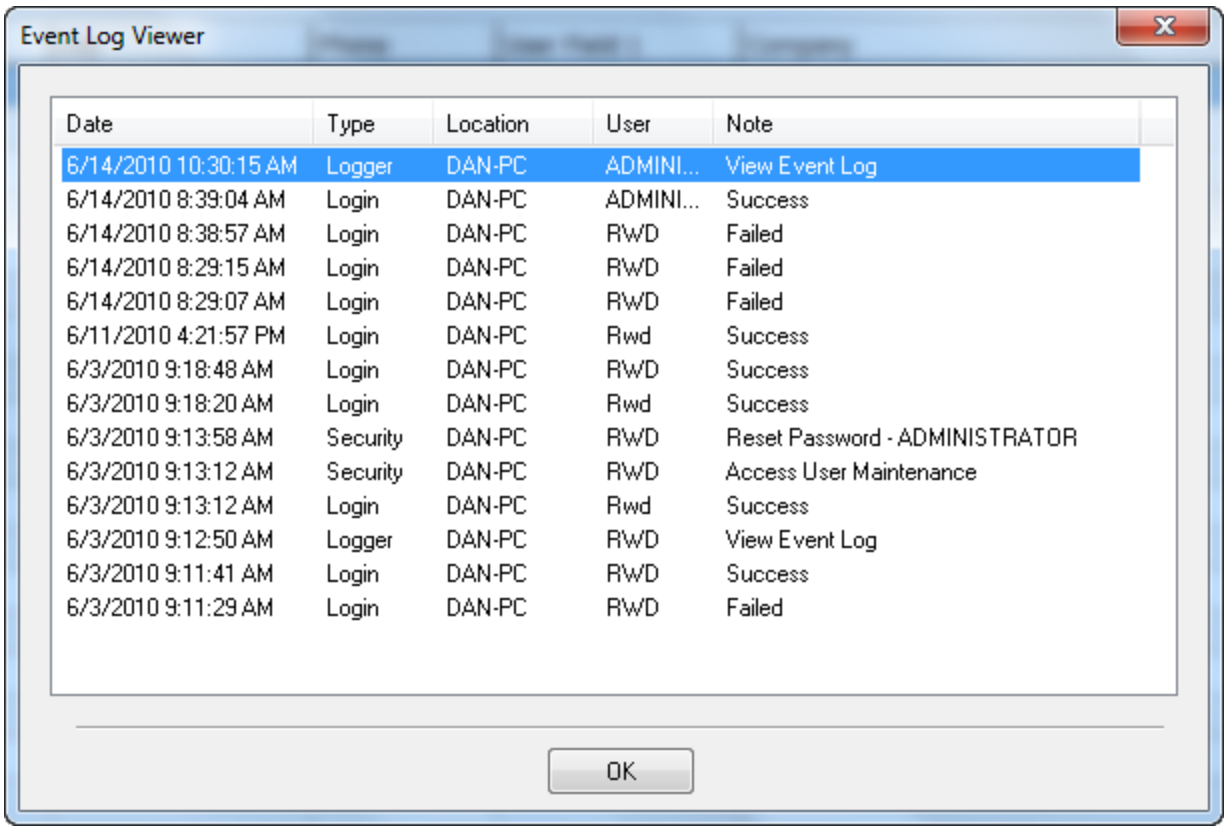
Related Topics

Enhanced Security Options

Set Up General Defaults

EVENT LOGGING

The Event Log allows you to view a list of the most recent events for your User ID. The Event Log is never purged, but only the 500 most recent log entries are displayed. Event logging is always on for most events, even if enhanced security is not activated.


Event Log Viewer
Date
Type
Location
User
Note
6/14/2010 10:30:15 AM Logger DAN-PC ADMINI... View Event Log
6/14/2010 8:39:04 AM Login DAN-PC ADMINI... Success
6/14/2010 8:38:57 AM Login DAN-PC RWD Failed
6/14/2010 8:29:15 AM Login DAN-PC RWD Failed
6/14/2010 8:29:07 AM Login DAN-PC RWD Failed
6/11/2010 4:21:57 PM Login DAN-PC Rwd Success
6/3/2010 9:18:48 AM Login DAN-PC RWD Success
6/3/2010 9:18:20 AM Login DAN-PC Rwd Success
6/3/2010 9:13:58 AM Security DAN-PC RWD Reset Password - ADMINISTRATOR
6/3/2010 9:13:12 AM Security DAN-PC RWD Access User Maintenance
6/3/2010 9:13:12 AM Login DAN-PC Rwd Success
6/3/2010 9:12:50 AM Logger DAN-PC RWD View Event Log
6/3/2010 9:11:41 AM Login DAN-PC RWD Success
6/3/2010 9:11:29 AM Login DAN-PC RWD Failed
OK

The event log may be accessed in the Inventory Module under **Tools >Security**. The following actions will result in an entry in the event log:

- Login attempts – both successful and unsuccessful
- Password entries for administrative actions
- Password changes

Copyright 2010, Resaleworld.com, Inc.

- Account lockouts
- Account lockout release
- Resetting another account's password
- Account creation and deletion
- Changing security level on other accounts
- Opening the event log
- Accessing credit card link configuration
- Altering credit card link configuration

Each entry in the Event Log contains the following information:

- Date & time
- Type of action
- Location (Name of computer on which action took place)
- Username
- Note (Success/Failed for authentication requests, name of component/resources accessed for other)

Related Topics

View Event Log

VIEWING THE EVENT LOG

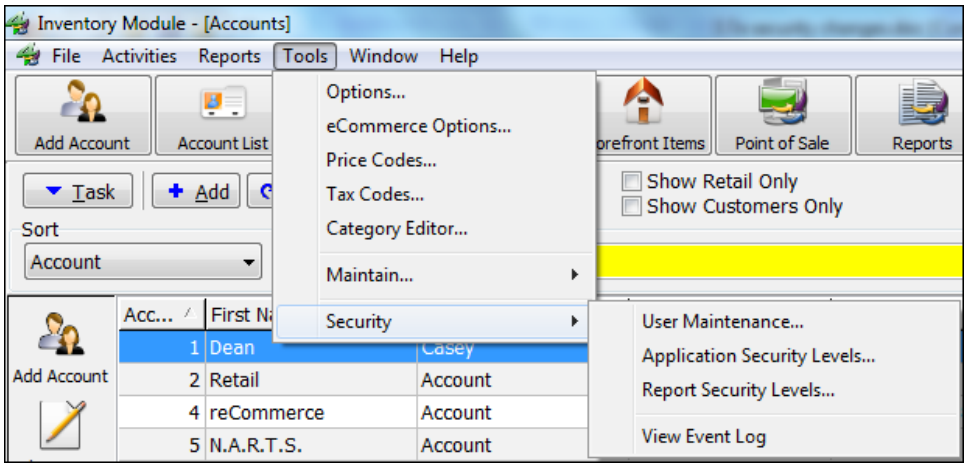
Inventory Module ➔ *Tools* ➔ *Security* ➔ *Security Maintenance*

The Event Log allows you to view a list of the most recent events for your User ID. The Event Log is never purged, but only the 500 most recent log entries are displayed.

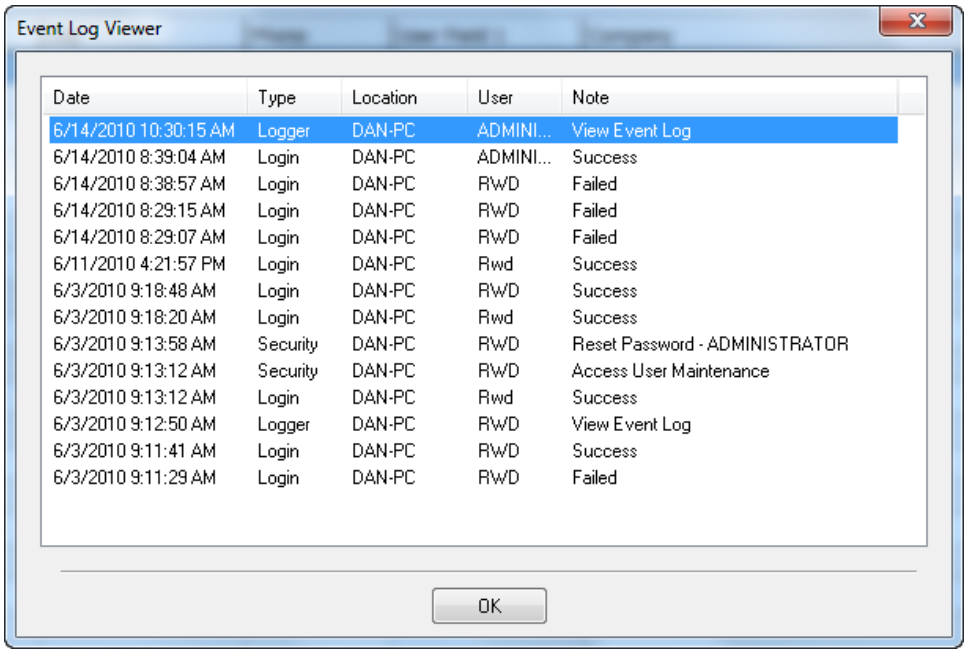
Copyright 2010, Resaleworld.com, Inc.

Access the Event Log:

1. From the **Tools** menu, select **Security > View Event Log**.



2. The **Event Log Viewer** displays.


Event Log Viewer
Date Type Location User Note
6/14/2010 10:30:15 AM Logger DAN-PC ADMINI... View Event Log
6/14/2010 8:39:04 AM Login DAN-PC ADMINI... Success
6/14/2010 8:38:57 AM Login DAN-PC RWD Failed
6/14/2010 8:29:15 AM Login DAN-PC RWD Failed
6/14/2010 8:29:07 AM Login DAN-PC RWD Failed
6/11/2010 4:21:57 PM Login DAN-PC Rwd Success
6/3/2010 9:18:48 AM Login DAN-PC RWD Success
6/3/2010 9:18:20 AM Login DAN-PC Rwd Success
6/3/2010 9:13:58 AM Security DAN-PC RWD Reset Password - ADMINISTRATOR
6/3/2010 9:13:12 AM Security DAN-PC RWD Access User Maintenance
6/3/2010 9:13:12 AM Login DAN-PC Rwd Success
6/3/2010 9:12:50 AM Logger DAN-PC RWD View Event Log
6/3/2010 9:11:41 AM Login DAN-PC RWD Success
6/3/2010 9:11:29 AM Login DAN-PC RWD Failed
OK

3. The following actions will result in an entry in the event log:

- Login attempts – both successful and unsuccessful
- Password entries for administrative actions
- Password changes
- Account lockouts
- Account lockout release
- Resetting another account's password
- Account creation and deletion

Copyright 2010, Resaleworld.com, Inc.

- Changing security level on other accounts
- Opening the event log
- Accessing credit card link configuration
- Altering credit card link configuration

4. Click **OK** to exit.

KEYBOARD SHORTCUTS (HOW TO AVOID THE MOUSE!)

In Liberty there are many shortcuts you can use to speed up the data entry process by using the keyboard in place of the mouse.

Keys for Menus and Buttons

You can use the keyboard to select any menu command on the menu bar or to select buttons in windows or dialog boxes. Press the **<Alt>** key and then press the letter that is underlined in the menu name or on the button name that contains the command you want.

Example: To select the File menu in Liberty Inventory or Liberty Point of Sale, press the F key while holding down the <Alt> key..

Liberty Inventory Tabs

While holding down the <Alt> key, press the number preceding the name of the tab. For instance, press <Alt> <1> for the Account tab, <Alt> <2> for the Inventory tab, etc. The figure below shows an example of these tabs:

Function and Shortcut Keys in Liberty Inventory

To speed data entry Liberty Inventory contains many function key shortcuts. These shortcuts eliminate the need to use the mouse every time information is entered. The action of each function key varies depending on the field:

Copyright 2010, Resaleworld.com, Inc.

F2 in the Category field Displays the Select Category dialog

F3 in the Category field Displays the Add Category dialog

F2 in the Attributes fields Displays the Add Attribute Value dialog

F2 in the Description field Displays the Description Lookup dialog

F3 in the Description field Displays the Extended Description dialog, which contains an HTML editor

F7 in the Description field Runs the spell checker on the contents of the Description field (but not the Extended Description field)

F8 in the Description field Runs the thesaurus on the contents of the Description field (but not the Extended Description field)

Function and Shortcut Keys in Liberty Point of Sale

Liberty PoS is **m**ouse-less! It has been designed to require no use of the keyboard to transact sales. All of the following keyboard shortcuts show on screen to aid you as you learn and use Liberty PoS.

F1 Liberty Help File (Help is also available from Liberty Inventory and Liberty Reports by pressing F1.)

F2 Easy Post.

F3 Change Post.

F4 Sale Post.

F5 Refund.

F6 Add a fee to a sale.

F9 Lookup a client's account.

F10 Finish (complete) transaction.

C Cash (when accepting payment).

K Check (when accepting payment).

O Coupon.

Esc In Liberty Inventory, <Esc> stops item entry. In Liberty PoS, <Esc> cancels the Sale.

Ctrl+T Make sale tax exempt.

Copyright 2010, Resaleworld.com, Inc.

Shift+Tab The opposite of the <Tab> and <Enter> keys, pressing the **<Tab>** key while holding down the **<Shift>** key moves the cursor back to the previous field.

Related Topics

How to Enter Items Faster

How to Enter Sales Faster

SET UP MERCURY PAYMENT SYSTEM

The following guide details the steps required to integrate Mercury Credit Card Processing in Liberty's Point of Sale module (PoS). The installation steps are as follows:

- Select Default Credit Card Software
- Configure Link Information in PoS
- Configure Payment Types for the Link

Once Mercury has been installed and configured, it can be used to process payments made by credit card, debit cards, and gift cards. It can also be used to add value to a new or existing gift card.

Related Topics

Processing a Sale in Mercury

Accepting Debit Cards in Mercury

Processing Gift Card Payments in Mercury

Copyright 2010, Resaleworld.com, Inc.

IMPORTING DATA INTO LIBERTY

If you have been using other Consignment/Drop-Off Store Software packages and are interested in importing data into Liberty, it will need to be in a particular format - .CSV (Comma-Separated Value). Liberty has two utilities for importing data - one for **Clients** (Accounts) and one for **Inventory** (Items). Accounts must be imported first so that you will have somewhere to import Items to. These .CSV files must be arranged in a particular format (i.e. first name, last name, etc.). Each utility details exactly how the data will need to be laid out within each .CSV file, respectively.

These utilities are available for download below. While Resaleworld.com can provide you with utilities for importing these .CSV files, Resaleworld.com is unable to support 3rd party applications, formatting .CSV files, etc. If you are unfamiliar with any of these file-types or the processes involved in importing/exporting data, please contact an IT Professional in your area or your Network Administrator for assistance with this process. Please do not contact Resaleworld.com for assistance with getting your data out of your 3rd party applications or manipulating/formatting .CSV files.

OUR COMMITMENT TO SERVICE

Resaleworld has a team of experts who are using the best support practices available to ensure you receive the best support possible. It is our goal to answer your questions or resolve your issues during your first call. We will work diligently to develop our tools and our processes so we can accomplish this goal.

Related Topics

Contacting Resaleworld

Copyright 2010, Resaleworld.com, Inc.

Obtaining Technical Support from Resaleworld

Resaleworld's number one priority is customer service. Please contact us whenever you are in need of assistance with your software.

Please note that there is a charge for technical support.

Updating Liberty to a New Version

Changes to the Liberty program are periodically made available. There are two types of changes:

- **Maintenance Releases**
- **Updates**

Maintenance Releases fix known errors, and are available only by downloading off the Resaleworld web site (at www.resaleworld.com). Maintenance Releases do not normally contain much in the way of new features. Maintenance Releases are released as often as once a month.

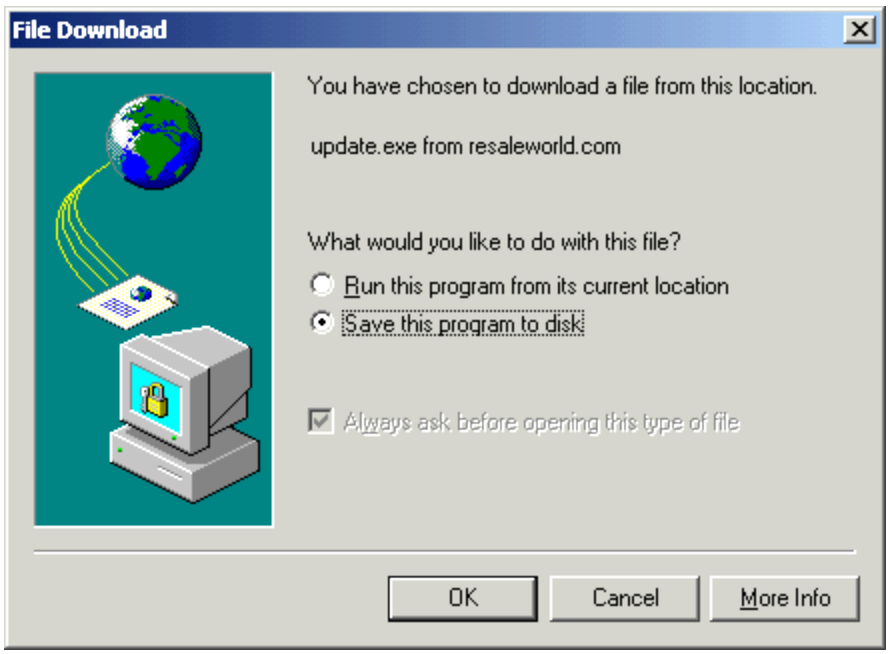
Updates contain new features and improved functionality. Updates are released on average once every 12 to 18 months. In some cases Updates are available on CD, in other cases Updates are only available by download. When new updates are available, Liberty will prompt you to download the update when you log in.

Warning: The procedure for installing Maintenance Releases is different for single user and network systems.

Copyright 2010, Resaleworld.com, Inc.

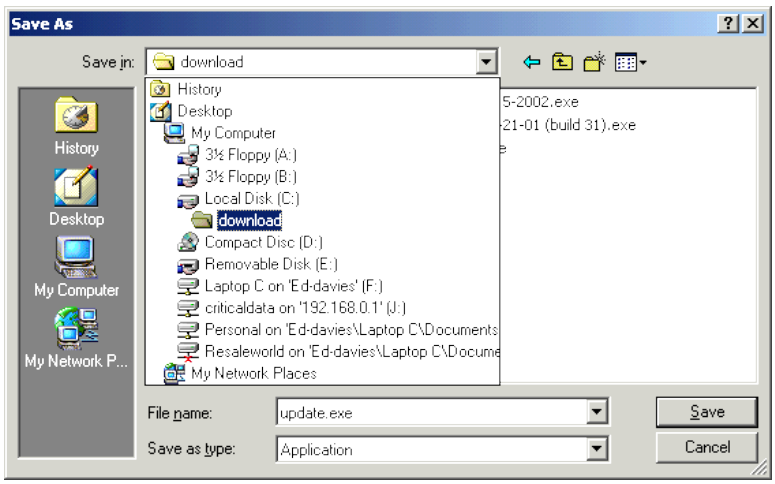
To Install a New Maintenance Release on a Single User System

1. Perform two backups of Liberty. See Backup Liberty Files for more information.
2. **Exit** Liberty and all Liberty related programs.
3. Go to the Resaleworld web site to download the Maintenance Release.
4. When the **File Download** dialog displays:


File Download
You have chosen to download a file from this location.
update.exe from resaleworld.com
What would you like to do with this file?
Run this program from its current location
Save this program to disk
Always ask before opening this type of file
OK
Cancel
More Info

Choose **Save this program to disk** and click the **OK** button. ***Do NOT choose Run this program from its current location.***

5. In the **Save As** dialog that displays:



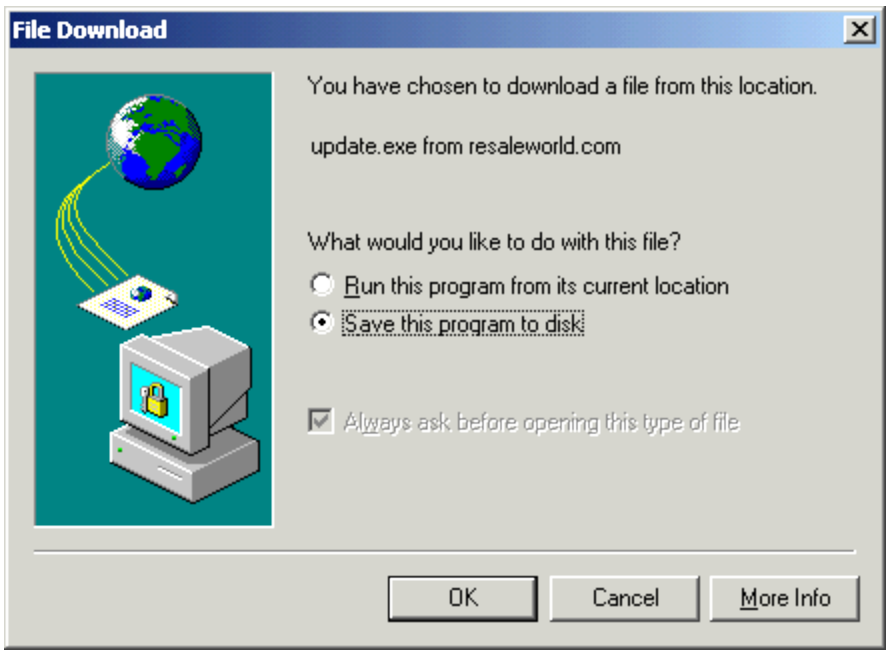
Select a folder to put the update in. Do **not** select the **/RWD/Updates** folder.

> ***Tip:*** *Create a folder called Download and download all files into this folder.*

6. Select the **Save** button in the **Save As** dialog.
7. The download will begin. Downloads take anywhere from a few seconds to an hour or more, depending on the size of the file being downloaded and the connection speed.
8. Disconnect from the Internet.
9. Turn off all virus protection programs and firewalls.
10. Open Windows Explorer.
11. Navigate to the folder the update was stored in.
12. Double-click the file **downloaded.file**. The Maintenance Release will be installed. The installation may take some time. Be patient, and **DO NOT INTERRUPT THE INSTALLATION PROCESS.**
13. When the process is complete, start Liberty.

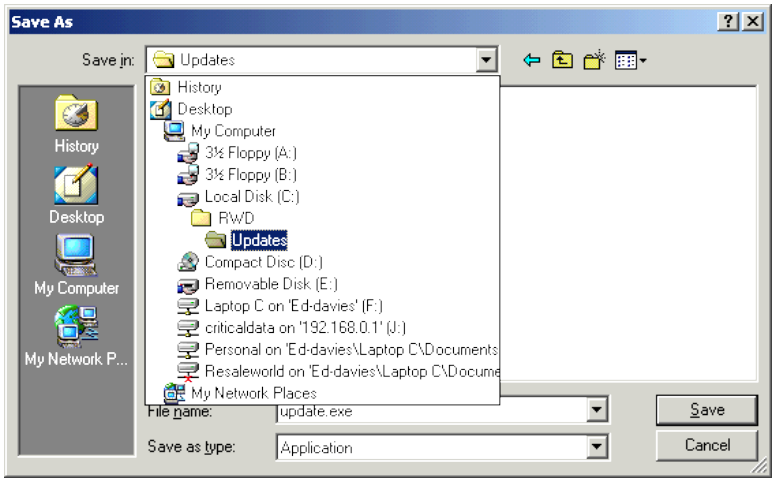
To Install a New Maintenance Release on a Network System

1. Perform two (backups of Liberty. See Backup Liberty Files for more information.
2. **Exit** Liberty and all Liberty related programs on the **Server** and **allClients** (Clients are also known as **Workstations**).
3. Go to the Resaleworld web site and download the Maintenance Release onto the Server.
4. When the **File Download** dialog displays:


File Download
You have chosen to download a file from this location.
update.exe from resaleworld.com
What would you like to do with this file?
Run this program from its current location
Save this program to disk
Always ask before opening this type of file
OK
Cancel
More Info

Choose **Save this program to disk** and click the **OK** button.

5. In the **Save As** dialog that displays:



Download the file into the **/RWD/Updates** folder.

VERY IMPORTANT: Do not put the downloaded file into a different folder than \Rudbeckias, or the update process will not run correctly.

6. Select the **Save** button in the **Save As** dialog.
7. The download will begin. Downloads take anywhere from a few seconds to an hour or more, depending on the size of the file being downloaded and the connection speed.
8. Start Liberty on the workstation. The installation may take some time. Be patient, and **DO**

Copyright 2010, Resaleworld.com, Inc.

NOT INTERRUPT THE INSTALLATION PROCESS.

9. Install on every Client on the network that runs Liberty and start the Liberty program.
10. When the Server and all Clients have been updated, open **Windows Explorer** on the **Server**.
11. Navigate to the **C:\RWD\Updates** folder.
12. Rename the update.exe file using the following syntax: Update {Today's Date}.exe.

    Example: If an update is downloaded on February 6, 2009, change the name from **update.exe** to **update 2-6-2009.exe**.

> ***Note**: Failure to perform this step will cause the update to keep installing itself every time Liberty is opened. This won't hurt anything, but it will be a pain…*

> ***Tip**: To rename the file, right click on the file, select **Rename**, press the **<End>** key, press the **<Left Arrow>** key **4** times, type in the **Date**, then press **<Enter>** once.*

ORDERING PRICE TAGS FROM RESALEWORLD

Price tags and price labels are available from Resaleworld by calling our Supplies Department. Price tags are available from Resaleworld at very low prices, and are ***guaranteed to work with Liberty***.

Related Topics

Ordering Computer Checks from Resaleworld

Ordering Computer Equipment from Resaleworld

Ordering Supplies from Resaleworld

Sample price tags and price labels

Copyright 2010, Resaleworld.com, Inc.

Ordering Computer Checks from Resaleworld

Checks and other supplies are available from Resaleworld by calling our supplies line. Checks, price tags and other supplies are available from Resaleworld at very low prices, and are ***guaranteed to work with Liberty***.

> ***Note:*** *Some computer printers require paper to fed face down. Ink jet printers such as the HP 840 are an example. When ordering checks for such printers, be sure to instruct the manufacturer to deliver the checks in reverse chronological order. (There is no extra charge for this when ordering checks from Resaleworld.) This way the checks will feed in the proper order. Changing the printer's properties in the print driver to Start Printing from Last Page is* ***NOT*** *recommended. Doing so will interfere with your ability to Restart a check run when a problem is encountered.*

Related Topics

Ordering Price Tags from Resaleworld

Ordering Computer Equipment from Resaleworld

Ordering Supplies from Resaleworld

Ordering Computer Equipment from Resaleworld

Computers and computer peripherals such as price tag printers, bar code readers, Point of Sale equipment (receipt printers, cash drawers, and touch screen monitors), etc. are available from

Copyright 2010, Resaleworld.com, Inc.

Resaleworld by calling our Sales department.

Computer equipment is available from Resaleworld at very low prices, and is ***guaranteed to work with Liberty***.

> ***Note:*** *Not all computer peripherals work with Liberty. We highly recommend contacting Resaleworld before purchasing equipment from another source* ***just in case****.*

Related Topics

Ordering Price Tags from Resaleworld

Ordering Computer Checks from Resaleworld

Ordering Supplies from Resaleworld

ORDERING SUPPLIES FROM RESALEWORLD

Supplies such as tag guns, fasteners, window envelopes to mail checks in, etc. are available from Resaleworld by calling our supplies line. Supplies are available from Resaleworld at very low prices, and are ***guaranteed to work with Liberty***.

Related Topics

Ordering Price Tags from Resaleworld

Ordering Computer Equipment from Resaleworld

Ordering Computer Checks from Resaleworld

Copyright 2010, Resaleworld.com, Inc.

SOFTWARE TRAINING

Training in the use of Liberty software is available from time to time from Resaleworld. We offer training in the following venues:

- **Online** with one of our training specialists.
- **Seminars** held in Orlando, Florida, the location of Resaleworld's corporate headquarters.
- **Seminars** held at the Annual National Association of Resale and Thrift Shops (NARTS) Conference. Conferences are held each year in a different city over the last weekend of June. Seminars are usually held the preceding Thursday and/or following Monday.
- By arrangement in your store, city or region. We will custom design a training program just for your store, or for a group of stores that wish to receive training together.

For more information and rates, please contact Resaleworld.

Related Topics

How to Contact Resaleworld

SEND US YOUR FEEDBACK!

At Resaleworld, we work hard to provide you with state of the art, intuitive software, accompanied by top quality services and products. Additionally, we try to provide superior online documentation to enable you to work independently in managing your Web and in-store sales.

To give us your feedback on the Liberty software or the online documentation, you may either:

- Send an e-mail to support@resaleworld.com
- Post a suggestion on the Resaleworld Message Board at http://www.resaleworld.com
- Give us a call the old fashioned way!

Copyright 2010, Resaleworld.com, Inc.

Related Topics

How to Contact Resaleworld

BACKUP OVERVIEW

It is CRITICAL that backups be done on a daily basis to protect you from losing data in the event of computer failure, theft, etc. We have had numerous customers use their software for years while rarely or not backing up at all, only to LOSE ALL THEIR DATA! DON'T BE ONE OF THEM!

Here is some advice: When it comes to backing up, rely only on yourself. Backing up is YOUR responsibility, nobody else's. Do not rely on an employee, a relative, the computer guy, or even Resaleworld. When it comes to something this important always RELY ONLY ON YOUR-SELF.

Warning: Periodically check your backups by restoring them. Do this by restoring data. Why? Just because a backup seems to work properly does NOT mean that it actually does. The ONLY way to know for sure is to try restoring the backup! To test your back-ups, install Liberty at home or on another computer separate from your "live" systems. Restore your database and see if the most-recent data you have entered is there. We rec-ommend doing this on a regular basis, to ensure backups remain functional.

Backup Disclaimer

The entire, sole, absolute, final responsibility for backing up rests with YOU, the user of this program. Only YOU have the power to exercise the control necessary to guarantee your back-ups work properly, are done regularly, and are 100% reliable. **The information provided herein comes without any guarantee or warranty of any kind whatsoever.** Consult the Soft-ware License Agreement by selecting **Help → License Information** for more information.

Related Topics

What is Backing Up?

What Causes the Need to Backup?

Backup Liberty Files

Automatic Safety Backup

Copyright 2010, Resaleworld.com, Inc.

Restore Liberty Files

Using Third Party Backup Software

What is Backing Up?

What is Backing Up, and why is it SO Important? Backing up means making a safety copy of a program's information for storage somewhere else. This is done in case something happens to the original information, and is important because if you ever have a problem that keeps you out of the program, Windows will let you *restore* the good data. Restoring is the process of taking information contained in a backup and putting it back into the computer.

Backing up is your only insurance against losing all the work you have done in your store. Having a backup allows you to restore your program to the way it was at the moment you made that particular backup. Not having a backup is a sure road to ruin.

Few people realize the benefit of making a back up copy until it is too late. If you think backing up is troublesome, you're in the majority. Think of it this way: weigh the amount of time it takes to back up your data, then consider the hundreds of hours it would take to re-enter your valuable data, assuming you could remember it all. Failure to back up your system on a daily basis could cost your store a tremendous amount of time and, yes, money. It could even force you out of business.

Backups are usually done to a USB Thumb Drive, CD, zip drive, or tape drive. Backing up usually takes only several minutes each day.

Your backup routine should use a different drive, disk, or tape for each day of the week that you are open, plus one additional set to be kept off site in case of fire, flood, or theft. Permanently archiving a backup once a month is also recommended.

WARNING: DO NOT USE THE SAME DISK OR TAPE OVER AND OVER DAY AFTER DAY! ROTATE THROUGH A SET OF AT LEAST 6-8 DISKS OR TAPES.

Label the media (disks, tapes, CD's etc.) Monday, Tuesday, Wednesday, etc. Then on Monday use *Monday's* media, Tuesday use *Tuesday's* media, etc. If you follow this system daily you will greatly reduce the likelihood of losing your valuable information. This will increase your chances of not copying corrupted data over slightly older but good data.

Copyright 2010, Resaleworld.com, Inc.

A common source of confusion is what happens when you reuse the backup disk(s) or tapes every week. When we say you should have a different disk or tape for each day you are open, the backup is not copying just information from, for instance, Tuesdays only. What happens each time you backup is that ALL information in your system is copied onto the disk(s) or tape. Today's backup is a copy of all of the data on your system. Next week on this same day, using the same disk(s) or tape, the data from today is erased by the new backup, which contains ALL data in the system up through that day.

How often you make a backup, rotating through several complete sets, and where you store them all have relevance to how safe you are keeping your precious information. So does your awareness of any unusual circumstance with your computer. The degree of care you take with your backup can protect you against everything from rare events such as theft or fire to more common problems such as data corruption.

Another factor that will affect your backup as a security system is the reliability of your disks and/or tapes. Be aware that Windows may display a message telling you that the CD, DVD, or disk simply won't do the job anymore, in which case you need to replace the media. As media ages it will tend to develop problems. Tapes, CDs, DVDs and Zip Disks are generally fairly durable, but should not be used more then 2-3 years.

When you have finished reading this section, if you still have questions, or don't understand certain aspects of backing up, find out the answers. The old saying *No question is a dumb question* goes **TRIPLE** with regard to backing up your system. This may sound like a broken record, but it is **ABSOLUTELY CRITICAL** for you to do this EVERY day, WITHOUT FAIL. People who don't follow this advice inevitably live to regret it. We have been witness to numerous instances of computer system users who got lazy, didn't back up their files, and then LOST ALL THEIR DATA! And it COULD NOT BE RETRIEVED!

Related Topics

Backup Overview

What Causes the Need to Backup?

Backup Liberty Files

Automatic Safety Backup

Restore Liberty Files

Using Third Party Backup Software

Copyright 2010, Resaleworld.com, Inc.

WHAT CAUSES THE NEED TO BACKUP?

Why is it so important to keep extra copies of the information contained within your computer by backing up? What events could possibly cause a catastrophic loss of information?

- **Mechanical Failure**. Like all other man-made, mechanical objects, computers don't last forever. They all eventually fail, some sooner than others. Sometimes when they fail the data can be recovered only at a cost of over a thousand dollars. Other times the data simply cannot be recovered, no matter what is done or how much money is spent. When this happens, if you don't have a recent backup, you are totally ...! (fill in your own special choice of terrible words and phrases).
- **Human error**. Computers, especially when they are running, are fragile. Serious damage can result from simply moving a computer while it is running and not being extremely careful not to bump it into anything.
- **More human error**. Another scenario involves someone working with your computer system and accidentally erasing files or modifying files in such a way as to bring the system to a screeching halt. If it happens to programmers (and it does - frequently!), it can certainly happen to you, an employee, a trusted friend, or a hired consultant.
- **Electric Power Failure**. If your power fails at the wrong time, certain files may become corrupted. While the majority of the information in the computer should not be affected, you never know...
- **Bad Electric Power**. Electricity is the life blood of all computers, yet electric power is not always consistent, uniform, or unpolluted. In fact, electric power can be considered in some places at some times to be the equivalent of breathing Los Angeles air during a smog alert, only worse. Many computers have died a premature death due to dirty power.

  NOTE: *To guard against electrical problems, we highly recommend purchasing an Uninterruptible Power Supply (UPS). A UPS filters the power before your computer receives it, (similar to filtering dirty water for human consumption). It also keeps the system going during electrical brownouts and blackouts. Using a UPS guarantees your computer will last longer and give more consistent service with far fewer problems. If you live in an area with a lot of lightning (including the plains states, gulf coast, southeast U.S. and especially Florida) a UPS is simply mandatory.*

- **Theft**. Yes, it could happen to you. Maybe it already has. Of course, insurance will cover the cost of a new computer system. Unfortunately nobody can replace the data contained

Copyright 2010, Resaleworld.com, Inc.

in your system unless you have a reliable backup of your system.

- **Fire**. Just like theft, it could happen. Probably it won't ever happen, and if it does, insurance should cover replacing the computer (among other things). Again, nobody can replace the data contained in your system unless you have a reliable backup.

NOW FOR THE GOOD NEWS. If you back up your system regularly you will actually be in a much safer position than you are currently. This is because if you are not currently computerized, you probably only have one copy of your files. Backing up properly will give you at least five relatively up to date separate copies of your files.

Related Topics

Backup Overview

What is Backing Up?

Backup Liberty Files

Automatic Safety Backup

Restore Liberty Files

Using Third Party Backup Software

BACKUP LIBERTY FILES

Inventory Module → *Tools* → *Maintain* → *Backup Database*

It is critically important that you back up Liberty files daily. Doing so is the only way to protect against losing data in the event of computer failure, theft, etc.

When you exit Liberty Inventory, you are prompted once a day to perform a backup using Liberty's built in backup routine. For safety, this automatic backup prompt cannot be turned off.

We recommend you use the Liberty backup routine **every single day**. We also recommend performing an extra backup once a week and storing the backup media off-site. We further recommend archiving a backup once a month and storing it in a safe deposit box or other extremely safe place. To summarize the Recommended Backup Strategy:

Copyright 2010, Resaleworld.com, Inc.

Recommended Backup Strategy

1. Backup every single day.
2. Perform one extra back per week and store the backup off-site.
3. Backup one extra time per month and store in a safe deposit box or other, ultra safe location.

To Set Up Liberty Backup

1. Select **Tools → Options → 7 - Backup**.
2. Enter the backup drive in the Backup Directory field. The default is **A:**, which on most computers represents the 1.44 Mb floppy drive.

    a. **USB Thumb Drive.** You can purchase these in our online store. USB Thumb Drives (also called Flash Drives) are so common these days that they can be found almost anywhere. USB Thumb Drives are assigned a letter, typically E, F or G. To determine your drive's letter, connect it to your computer, open your My Computer/Computer window and make note of the letter Windows has assigned to your USB Thumb Drive. It is important to verify your drive letter on a regular basis. Windows always assigns the "next available" letter, so if a new device was connected, it will be assigned the letter your USB Thumb Drive was previously assigned.

    b. **Zip® Drive** (manufactured by Iomega). Zip drives often use **E** as their drive letter - consult the documentation that comes with your computer and/or zip drive for more information.

    c. **CD-RW** or **DVD +-RW**. CD and DVD drives often use **D** as their drive letter - consult the documentation that comes with your computer for more information. They also require specific software to run – consult the documentation for this software for more details.

To Back Up Data

1. If you have a network, backups are generally performed on the Server. Consult your network technician if you are not sure, and be sure to verify the backup runs correctly.
2. Put a disk in the drive selected in the **Backup Directory** field (see **To Set Up Liberty Backup**, above).

Copyright 2010, Resaleworld.com, Inc.

3. From Liberty Inventory's main menu select **Tools** → **Maintain Backup** → **Backup Database** and follow the instructions on the screen.

What Is Backed Up

When run upon exiting Liberty while in Real Mode or by selecting **Tools** → **Options** → **Backup** (in Real Mode), the Liberty Backup routine creates two files:

- **RWDDATA.zip** - containing the contents of the \RWD\Data\Working folder
- **Images.zip** - containing the contents of the \RWD\Images folder. (If there are no images, then this file is not created.)

Related Topics

Backup Overview

What is Backing Up?

What Causes the Need to Backup?

Automatic Safety Backup

Restore Liberty Files

Using Third Party Backup Software

AUTOMATIC SAFETY BACKUP

Windows 98, 2000 and XP contain a **Task Scheduler** routine. This routine provides a convenient way to perform additional backups, and it is ***highly recommended that you do so***. Note the following about using this routine to schedule automatic backups:

WARNING: BACKING UP USING THE TASK SCHEDULER IS IN NO WAY INTENDED TO REPLACE YOUR NORMAL BACKUP. THIS IS AN *ADDITIONAL* BACKUP PROGRAM ONLY.

It is suggested you choose to backup using the Task Scheduler once a week. This will provide archive backups going back up to seven weeks. Since following our backup recommendations provides a backup for every day going back one week, this approach provides an excellent way to handle problems that require restoring from a backup that is older than one week.

Copyright 2010, Resaleworld.com, Inc.

RESTORE LIBERTY FILES

Start → *Programs* → *Liberty* → *Restore Database*

To restore Liberty from a backup created by the Liberty program, use the **Restore Database** routine to restore from backup.

Warning: You should be thoroughly familiar with the procedures and ramifications of restoring files. Improper use of any Restore routine can make a bad problem worse and even lead to disaster. If you are unsure in any way about how to safely restore files, contact a local computer technician and/or Resaleworld for assistance.

Warning: Do a backup on a different disk(s) or tapes than the one(s) you are restoring from BEFORE you Restore files. This safety measure will allow you to return to where you were prior to the Restore in the event that the Restore should not have been performed in the first place.

To Restore Files From Backup:

1. Select **Start** → **Programs** → **Liberty4 Consignment** → **Restore Database**.
2. Use the **Browse** button to navigate to the file to be restored.
3. Select the **Restore Database** button.
4. Follow the instructions as they appear on screen.

Notes on Restoring from an Automatic Safety Backup:

- Backups performed with the Automatic Scheduler are stored in the **\RWD\Backups** folder on the C Drive.
- Up to seven backups are created.
- The names given to the backups are RWD1.zip, RWD2.zip… RWD7.zip.

Copyright 2010, Resaleworld.com, Inc.

- The 8th backup performed is given the name RWD1.zip, and overwrites the previous RWD1.zip file; the 9th backup performed is given the name RWD2.zip, and overwrites the previous RWD2.zip file; etc.
- The Automatic Scheduler Backup does not back upLiberty4 photographic image files.

Related Topics

Backup Overview

What is Backing Up?

What Causes the Need to Backup?

Backup Liberty Files

Automatic Safety Backup

Using Third Party Backup Software

USING THIRD PARTY BACKUP SOFTWARE

Important Note: The database engine cannot be running when a backup is performed. You must work with a third party backup vendor that is familiar with backing up SQL Databases and turning the database engine off and on again.

Many of our customers have professional computer technicians come in to help setup automated tape backups or off-site backups, or setup their own backup system. Typically this requires some sort of third party backup software or some sort of scan of the entire hard drive which copies all contents to a backup location.

Liberty uses an SQL Database, and therein lies the challenge, because it is NOT possible to simply copy and paste an active SQL database from one location to another. Thus, if you use a standard automated backup program, it will only copy over files, programs, etc., but will not be able to copy the SQL database.

Resaleworld has a ***number*** of customers discover this once it was too late. We're not kidding here, nor are we exaggerating! If you are going to have an automated backup routine setup, make sure your technician understands how to work with SQL and databases in general. Veritas, for example, designs backup software that is capable of interacting with databases such as SQL.

Copyright 2010, Resaleworld.com, Inc.

Files to Backup

Warning: The backup and restore routines built into Liberty are designed to handle the fact that the data files are *Attached* to the program via the MSSQL Engine.

Because of this, restoring a non-Liberty backup will likely require obtaining help from both the Resaleworld technical support department and the manufacturer of the Backup/Restore software used.

Assistance with third party backup solutions is not included in Resaleworld's technical support programs. Separate, additional charges will be billed for assistance provided in this area.

To Backup the Entire Liberty Program:

- Backup the entire RWD folder and all of its subfolders.

To Backup Just the Data Contained in Liberty:

- Backup the RWD\Data\Working folder.

Related Topics

Backup Overview

What is Backing Up?

What Causes the Need to Backup?

Backup Liberty Files

Automatic Safety Backup

Restore Liberty Files

Copyright 2010, Resaleworld.com, Inc.

USING LIBERTY ON A NETWORK

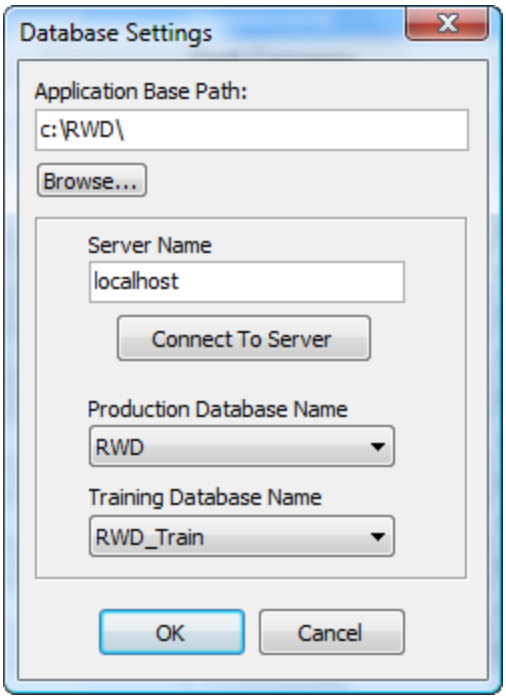
When utilizing Liberty in a Network environment, not only do you have to get your Windows Workgroup/Domain up and running, there are also **Shares** that need to be created. These will allow you to share images, HTML templates and Word Processor letters, as well as run reports. You could have Liberty pointed to the right server and Liberty will appear to work perfectly. It's not until you attempt to add images to an item or run a report that you'll see errors if your shares aren't configured.

When you install Liberty on a Network, one PC is designated as the **Server** (Main Computer), and all others are considered to be **Clients** (Additional Workstations). On the Server, you must share the Server's **C:\RWD** folder with **Full Control**. On the Clients, you must tell Liberty how to access the Share on your server.

There are two key components Liberty uses when running in a network environment:

- **Application Base Path -** This tells the application where to find files such as reports. This should always point to the Server's RWD folder. On a Server, this should be C:\RWD\. On a Client, this should be a UNC path that leads to the Server's RWD Share.
- **Server -** This tells the application where to find SQL Server.

Once the Server's **C:\RWD** folder is shared, you will need to configure your Clients to connect to the Server's **C:\RWD** Share. We recommend using the Universal Naming Convention (UNC). e.g **\\server\rwd**. When you install Liberty on your Clients, you'll be prompted with the database settings window:



> ***Note:*** *If you've already installed Liberty on your Client PCs and canceled out of the Database Settings window, you can re-launch it via C:\RWD\RWDBUtil.exe on each Workstation.*

In the **Application Base Path** field, enter a valid UNC path (e.g. \\server\rwd\) to the share you created on your server. Enter the server's name as well as the SQL Server Instance Name (e.g. Server\Liberty) in the **Server** field and click **Connect to Database**. If it connects with no errors, then choose **RWD** for your Production Database and **RWD_Train** for the Training Database - click **OK**. If you receive an error, verify you've correctly entered your server's name and make sure the server computer is accessible from the computer in question. Keep in mind, firewalls and security software can prevent incoming connections to SQL Server.

Image sharing is another important aspect of the Network setup you will want to address. All images that you add to inventory within Liberty need to be stored in the same location before they can be sent up to the Web. This is typically the Server's **C:\RWD\Image** directory. Set this on the Server under **Tools > Ecommerce Options > General Settings > General > Directory where Images are Stored**. On each Client PC, however, things will look a little different. Just as you did when specifying the Application Base Path for your Client PC, enter a valid UNC path to get to the Server's RWD\Image folder. e.g. \\server\rwd\image\

The Source Directory for Images does not pertain to Network setup. This setting lets you specify a particular folder or drive (e.g. a camera's SD Card is a "drive") that you'd like Liberty to look for new images within. One user might pull images directly from a camera's SD Card while another might have images stored on another computer/drive. The point is, this setting has nothing to do with your Network setup.

While you can choose a location other than RWD\Image to store your images in, only the settings outlined in the above steps are supported.

Another important network consideration is the **Synchronization** of items to the Web. On each PC, including the Server, you will need to have the **RWX Helper Service** running at all times, as this allows Liberty to communicate with the Web. The Clients send a synch request over the Network to the Server, so even though you're syncing from a Client, all requests are sent across the network to the Server. If you see a Socket Error, then communications between the Clients and the Server is being disrupted - usually by a Firewall. If you can sync from the Server but not the Clients, it is most likely the Clients are being blocked by a Firewall.

Finally, understand that sometimes Windows just needs to be rebooted. If Windows has been running for days or weeks, rebooting can resolve a lot of unusual issues that can arise in a Network environment, especially with Services running. Save any changes to your work and safely power down each computer on your network. Power the Server on first and once it's up and running, power on each Client.

Copyright 2010, Resaleworld.com, Inc.

Note: *Resaleworld.com does not support File Sharing, Network Drive Mapping, Firewalls, etc. Please consult a Network Technician or your Network Administrator for questions on Network setup and configuration.*

NETWORK SET UP INSTRUCTIONS

When setting up a network you must, **at a minimum**, know all of the following:

- Which computer is to be the Server,
- The name given to each computer,
- How to map drives and share directories,
- How to share printers over a network,
- How to properly connect (network) the computers, and
- How to set up permissions and network security.

Resaleworld does not provide support for network set up. If you are not familiar with networking computers, mapping clients to servers, etc. **contact a professional network technician** to install your software for you.

To Install Liberty on a Network:

1. Install Liberty on the **Server** following the Single User Installation instructions.
2. Enter the **serial number** for Liberty on the Server. Do not enter the serial number on any other computer besides the Server.
3. **Map** the client (workstation) to the Server's RWD directory. It is recommended that each client use the same drive letter to map to the server, such as **F**. If you are not familiar with mapping clients to servers, it is **STRONGLY** recommended that you contact a professional network technician to install your software for you.
4. Install Liberty on the **Client** following the same instructions as you followed in step one, *but with one exception.* When the **Welcome** dialog appears and you are asked to choose Server or Client install, choose **Client Install.**
5. Choose **Client Install**

Copyright 2010, Resaleworld.com, Inc.

On some computers the **Microsoft Shared Data Access Components Set up Screen** may appear. If it does, click on the **I accept all the terms and conditions of the preceding license agreement** check box, click **Next**, then click **Finish**. After the components have loaded, click **Close**. This process may take a couple of minutes to complete.

6. Once Liberty has been installed on the Client, the **Database Settings** dialog will display:

7. Set the **Application Base Path** to point to the C drive of the Server. For example, if the C drive on the server is mapped to the F drive on the client (workstation), enter **F:**.
8. Enter the name of the computer which is serving as the Server in the **Server Name** field.

   If you do not know the name of the server and are running Windows 2000, go to the server, right click on **My Computer**, select **Properties**, then select the **Network Identification** tab. The name of the computer will appear to the right of **Full Computer Name**.
9. Click the **Connect To Server** button.
10. Check the **Production Database Name** field. It should say **RWD**.
11. Check the Training Database Name field. It should say RWD_Train.
12. Click the **OK** button.
13. Repeat steps 4-11 on all remaining Client computers.
14. Additional set up is required within the Liberty program to run Liberty on a network.

Copyright 2010, Resaleworld.com, Inc.

Please see the sections entitled Set Up Terminal IDs and Assign Terminal IDs for more details.

Related Topics

Serial Numbers

Install Liberty (single user)

Updating Liberty to a New Version

Why Use a Separate Accounting Program?

Liberty is designed to handle inventory control and point of sale. Because client payouts are intimately connected to inventory control, Liberty handles this aspect of accounting. But because accounting is a realm unto itself, Liberty leaves the more extensive accounting to other programs.

Quicken® and QuickBooks® are designed specifically to handle accounting functions. They both give tremendous power and flexibility and both provide exceptional service. We recommend using QuickBooks as opposed to Quicken, because it is far more suited for use by small businesses. Quicken is designed to be a personal finance program, not a business accounting program.

QuickBooks Link Module

Liberty's **QuickBooks (QB) Link** fully integrates Liberty and QuickBooks. The Link is a much more powerful tool then the Export routines that are provided within Liberty. The Link allows you to take full advantage of the power contained in QuickBooks by exporting not just

Copyright 2010, Resaleworld.com, Inc.

consignor payouts but all accounting related information contained in Liberty. The QuickBooks Link is a stand alone program: for purchase information please contact the Resaleworld sales department at (800)858-1758.

If you have purchased the QuickBooks (QB) Link and have entered your QB Link serial number in Liberty, the next step is to configure Liberty to export to QuickBooks. Liberty exports all financial information such as Fees, Tax Codes, Payouts, Credit Card transactions, etc. to QuickBooks, which stores this information using General Ledger (G/L) Accounts. In order to make everything from Liberty fit into QuickBooks, you must first specify these G/L Account Names & Types in a variety of locations within the Liberty software.

> ***Note:*** *QuickBooks is a very powerful and complex software application. While Liberty does support the exporting of financial data to QuickBooks, there are many settings and functions that can effect this process. You may need to consult Intuit for questions regarding QB configuration and data management.*

The QuickBooks Link (QBL) module was designed to export all accounting information generated in Liberty to **QuickBooks 2002 PRO** or later versions which support Intuit's automatic import function. It will not work with any version prior to **QB 2002 PRO**.

What the QuickBooks Link Does

First, the QB Link will create any necessary accounts in QB which are required to support the posted transactions in Liberty. This includes all Asset, Liability, Income and Expense accounts. This is done automatically so there is no need to make sure your QB accounts are already there.

Next, it scans sales transactions, printed as well as manually posted checks and all transactions which affect the balance of a consignors' account (e.g. Dry Cleaning, Store Credit, Deductions, Credits, etc.).

It will then create daily balanced Journal Entries into the Banking area within QB. It will automatically create batch numbers in QB for you. It will not export information that is not in balance. We will cover what happens if transactions don't balance later on.

Getting Started

Before you can actually export information to QB, you will need to enter account information and account type information into Liberty in various places within the program. Before you proceed, you must go into QB and go to **Edit Preferences, Accounting, Company Preferences and check the Use Account Numbers, Require Accounts, And Automatically Assign General Journal Entry Numbers.**

Copyright 2010, Resaleworld.com, Inc.

Step 1. Transaction Types Maintenance

The first area which requires information is the Transaction Definitions maintenance. Here you will have to enter an Account Name and indicate the type of account it is. Your choice of account type is limited to whether or not the account normally debits or credits the account. You will be asked if this account is an Income account (normally credits) or an Expense account (normally debits).

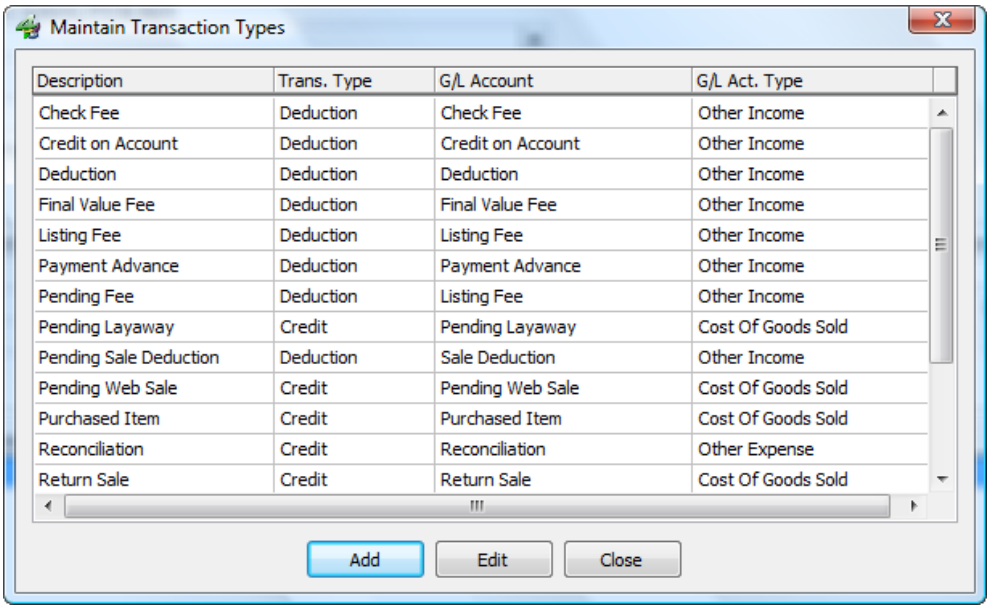


Figure 1

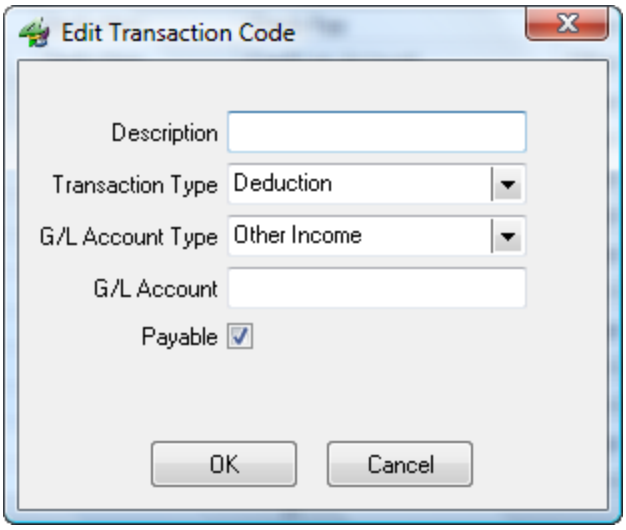


Figure 2

In Figure 1, this "Consignment Fee" normally credits a QB account because it is an income to the store. In essence, it is "taking away" a deduction) money from the consignor account and giving it to the store (Income or Other Income).

If this transaction was a "Credit", it would be the opposite; you would be "giving"money to the consignor account and taking it away from the store (an expense). You would only be able to enter (Expense or Other Expense) as the G/L Account Type for this type of transaction.

Make sure each transaction type has a **G/L Account** name and a **G/L Account Type** before proceeding to the next step.

Step 2. Payment Accounts Maintenance

This step is required so that QB understands what accounts should be created in order to process your printed checks, payouts and manually posted checks.

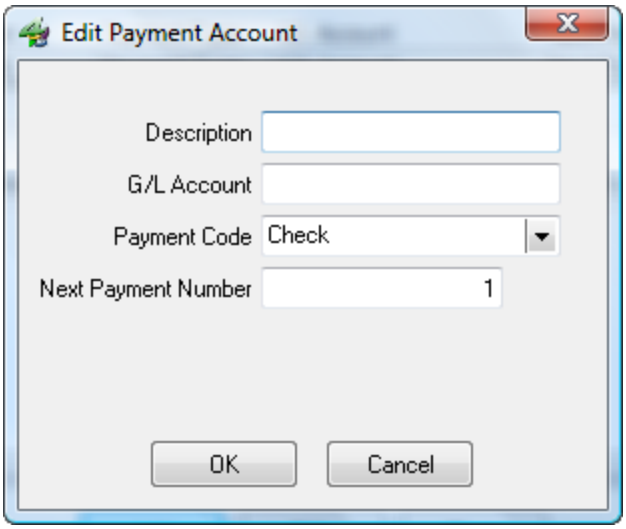
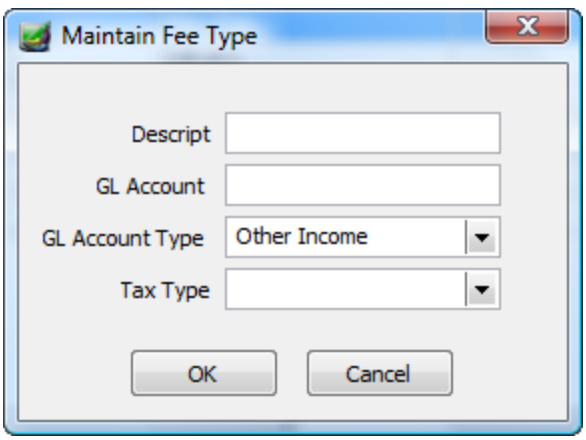


Figure 3

The only field which you should be worried about on this screen is the **G/L Account** field. The QBL will automatically assign it a **Bank** account type for these accounts. Make sure that each payment account you have has the Account name filled in.

Step 3. Fee Types

Next, you need to jump over to the **Maintain Fee Types** area in Order Manager. Here you will enter in G/**L Account** and **G/L Account Type** Information.



Most of your account types here will be either Income or Other Income because they are putting money in the stores' account. Make sure all the Fee Types have these two fields entered or the export will not work.

Step 4. Payment Types

The next step required in Liberty will be to edit the **Payment Types** in Order Manager. Most of the Payment Types in Liberty have already been assigned a value so you will not need to do anything. In fact, the GL Account Type field has been disabled for many of the Payment Types (see Figure 4a).

You will, however, need to enter the Account Types for any Payment Types that you have created. Figure 4b shows a payment type created by the store.

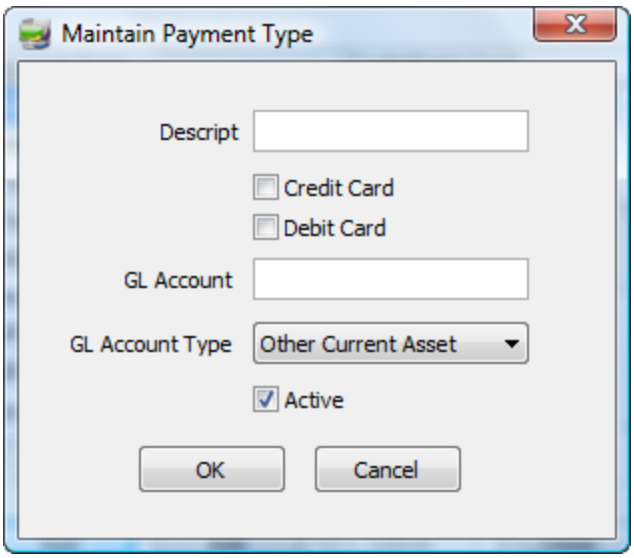


Figure 4a

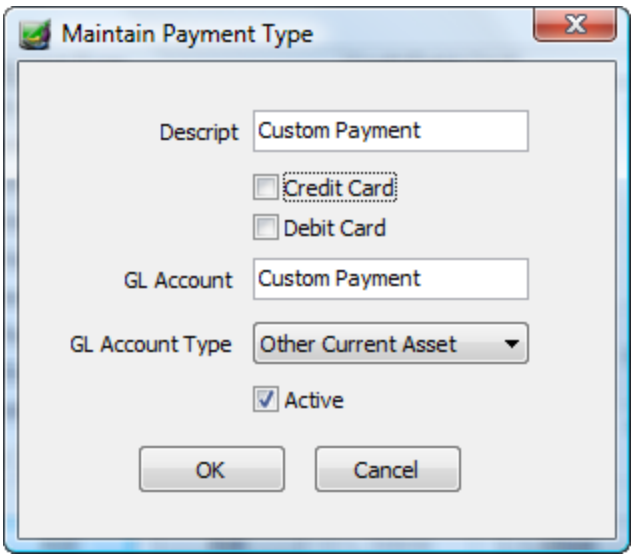


Figure 4b

The only available Account Types for Payments are either **Bank** or **Other Current Asset**. It would probably be best if you selected **Other Current Asset** for Payment Types that you have created and leave **Bank** for the system installed **Payment Types**.

Step 5. Tax Codes

Continuing on, you will have to enter the **Account Names** and **Account Types** for any **Sales Tax** entries in Liberty. To do this, select **Tools** → **Tax Codes**. You will have to enter an Account Name for each line of tax detail you have for your tax codes.

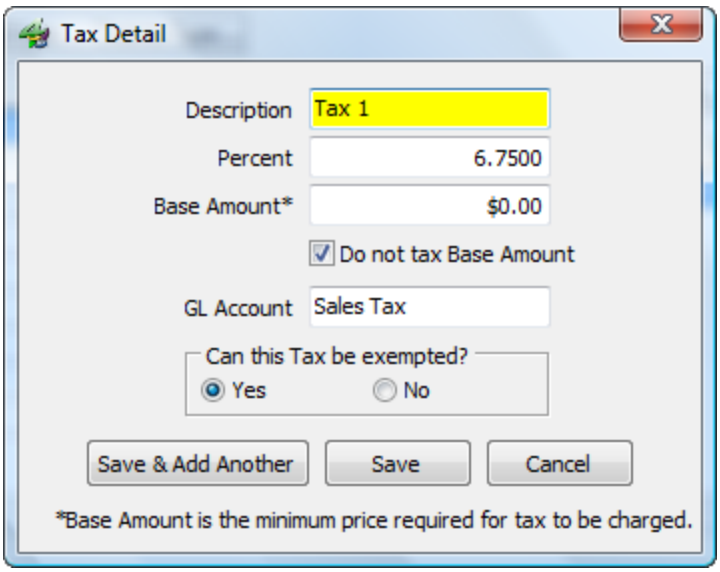


Figure 5

You will only have to enter the G/L Account Name for each line of Tax Detail. The G/L Account Type will already be set to **Sales Tax**.

Step 6. Product Lines

The last step required is to enter the Account Name and Account Information related to each Product Line you have in Liberty. This information is required so that QB understands where your sales information should be posted to, where your Cost of Goods should be posted to and where your Product Inventory purchases should be posted to.

There is no reason to enter G/L Account Type information for these Accounts. They are already stored in Liberty. **G/L COGS Account** will be a **Cost of Goods** account type, **G/L Inventory Account** will be an **Asset Account** and **G/L Sales Income Account** will be an **Income Account**.

Copyright 2010, Resaleworld.com, Inc.

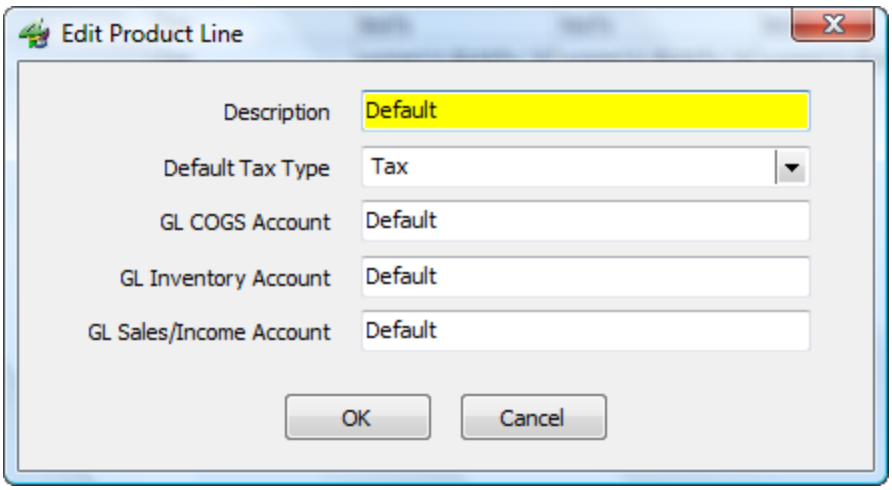


Figure 6

Step 7. Setting the QuickBooks Data File Path

In order for the QBL to work, the QB data file needs to reside either on the same drive as Liberty or a network drive which can be mapped to. You will need to tell the QBL where the data file is so that it can export correctly.

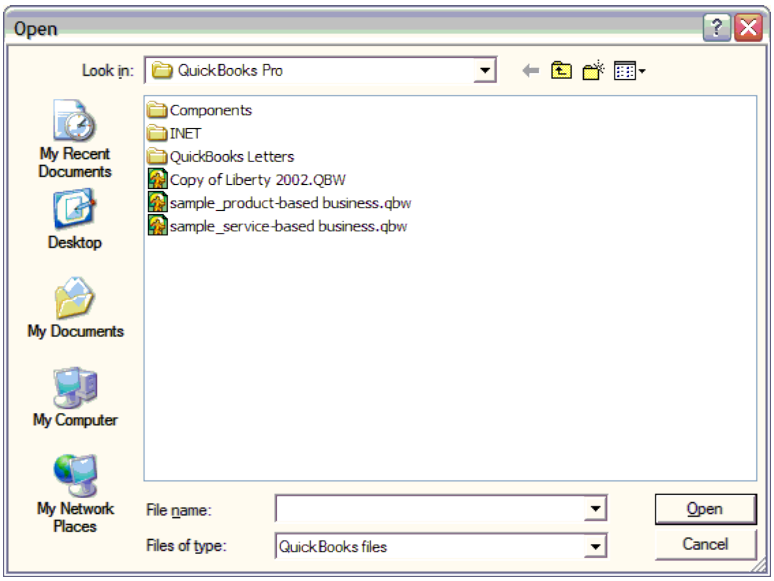


Figure 7

Click on the **Search for QB Company File** button to set the path of your QB data. Highlight the file and click **Open**. This will set the QB company name in the QBL. Make sure you click **Save QB Options** so that you will not have to reenter the path name the next time you want to export.

Step 8. Check for Accounts

Before you try your first export, you should always run the **Check for Accounts** procedure. This will scan all the Accounts and Account Types in Liberty to make sure you have everything

Copyright 2010, Resaleworld.com, Inc.

filled in correctly. If you don't, it will come back with an error. You can then go back into Liberty and fix the problem. Figure 8 shows what will happen when it finds no errors in Liberty.

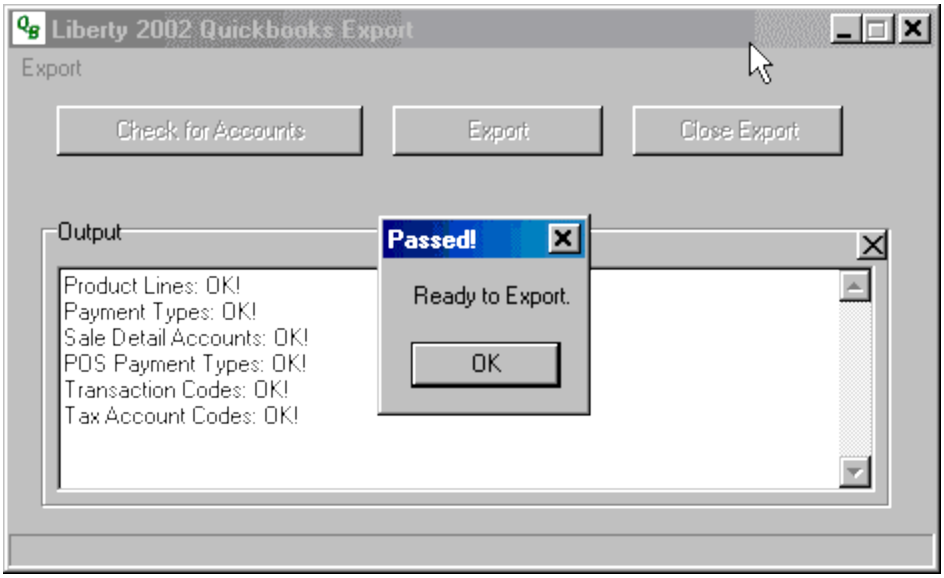


Figure 8

Step 9. Exporting for the first time

The first time you try to export with the QBL, you will be prompted for a start date. This date is very important because it is asking you what date you should start exporting entries from. All entries made after this date will be posted to QB. Any transactions made before this date whether they are sales or checks will not be posted. You will only be asked one time for this date. You will not be prompted for this date after your first export is completed.

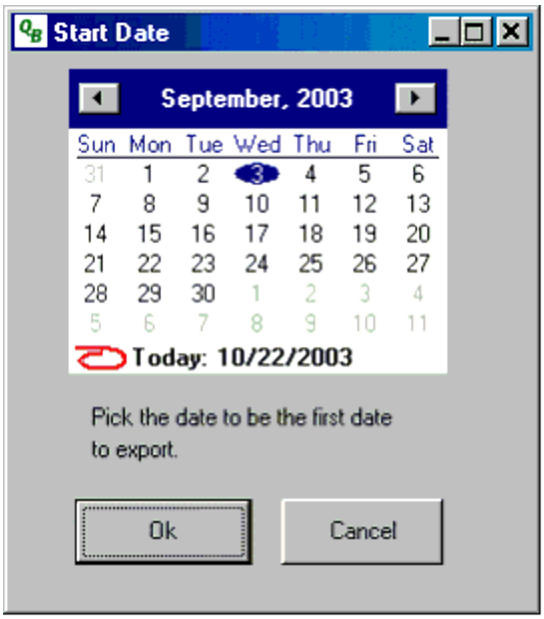

Start Date
September, 2003
Sun Mon Tue Wed Thu Fri Sat
31 1 2 3 4 5 6
7 8 9 10 11 12 13
14 15 16 17 18 19 20
21 22 23 24 25 26 27
28 29 30 1 2 3 4
5 6 7 8 9 10 11
Today: 10/22/2003
Pick the date to be the first date to export.
Ok
Cancel

Figure 9

Once you set the date and click **OK**, the export routine will automatically begin. So be ready by making sure your QB data is open.

Step 10. Running the Export

Make sure QB is running before you start exporting. QB requires that the file be open before you export. It is QB's way of saying **Are you allowed to enter transactions into QB or not**. (You can set QB to enable external applications to automatically access the data. See below for more information on how to do this.) Click the **Export** button and then sit back.

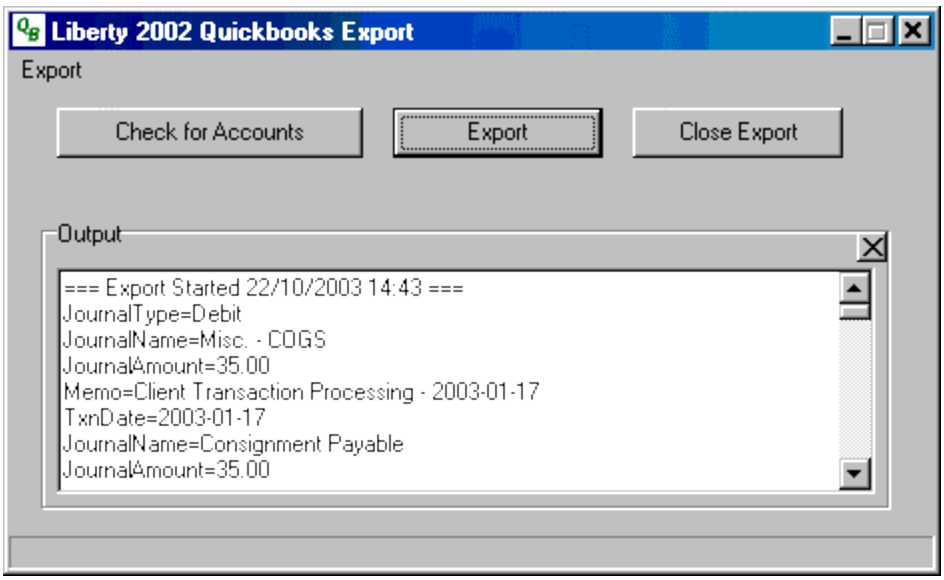


Figure 10

Figure 10 shows an Output screen indicating what is happening during the export process. All transactions created will be displayed in the output screen.

Miscellaneous Information

Two things to note during the export routine: two QB accounts will be created automatically. They are **Consignment Payable** (Account Type: Accounts Payable) and **Item Fee** (Account Type: Income). These accounts are needed to handle the offset of all the transactions created in the Transaction file for each consignor.

Also, a QB log (QBEXPORT.LOG) will be created in the RWD folder. This file will every-thing that happens during the export process and is a great way to understand what is happening during the process and also to identify any errors that may have occurred.

Link to Intuit's QuickBooks tech support: https://qbsupport.intuit.com/qb/call-us.do

Copyright 2010, Resaleworld.com, Inc.

QUICKBOOKS EXPORT

Inventory Module → *Activities* → *Accounting* → *Export* → *QuickBooks*

Use the QuickBooks Export to copy payout information from Liberty to QuickBooks® (made by Intuit). To learn more about why exporting information from Liberty to QuickBooks is highly recommended, please see the section entitled Why Use a Separate Accounting Program?

Warning: DO NOT USE QUICKBOOKS TO PAY CLIENTS. Only use Liberty to pay clients. Use the export routine to copy client payout information from Liberty to QuickBooks. Use QuickBooks for all other accounting activities such as paying the rent and expenses, calculating payroll, figuring taxes, etc.

Three Very Important Notes:

1. For complete integration with QuickBooks, use the QuickBooks Link: it provides much greater power and flexibility. Contact Resaleworld for more details.
2. As a safety precaution, we strongly recommend that you perform a backup of your accounting program BEFORE you import any files. Better safe than sorry.
3. Resaleworld supports the QuickBooks Export routine in Liberty, but not the import routine in QuickBooks. Contact Intuit for help using QuickBooks.

Accounting Link Terms & Definitions

Understanding the following terms will help you understand how to use the QuickBooks export:

ASCII	(pronounced ask-eee) Stands for **A**merican **S**tandard **C**ode for **I**nformation **I**nterchange. It is a standard format used for representing characters so that files can be shared between programs. Think of it as *universal language* that allows software programs to communicate with one another.
Export	To copy and send certain information out of a software program (in a format such as ASCII) to a second program.
Import	To receive information from (into) a software program.

Copyright 2010, Resaleworld.com, Inc.

File	A file is a collection of information stored as records. Usually the name of a file is in two parts: a filename and extension. The file-name and extension are separated by a period. The name of the QuickBooks export file is **Qbooks.iif**
Path	Path means the location of a file or files in your computer. For instance, the Liberty program is contained in the RWD folder (or **directory**), and on most computers the RWD directory is on the C drive. The path to Liberty is thus C:\RWD. When exporting a file using the QuickBooks export, the default path is C:\RWD. If you were to include the name of the file in the directory, the syntax would be **C:\RWD\Qbooks.IIF**

The information exported to QuickBooks includes the following:

1. Payout date and time (the date and time the payout was issued)
2. Amount of the payout
3. Payout number
4. The payee (the person or party to whom the check was paid)

To Run the QuickBooks Export:

1. Select **Activities** → **Accounting** → **Export** → **QuickBooks**. The QuickBooks Export dialog will appear.
2. Enter the **from and through Payout Numbers** to be exported. *Recommendation: leave these fields blank as it should not be necessary to specify this information to QuickBooks..*
3. Enter the **from and through Payout Dates** to be exported. Recommendation: this is the best filter to use. Set up a regular schedule to export information, e.g. export the previous month's payouts on the 5th of each month.
4. Enter the **from and through Client Account Numbers**. *Recommendation: leave these fields blank as it should not be necessary to specify this information to QuickBooks.*
5. Enter the **from and through Last Names**. *Recommendation: leave these fields blank as it should not be necessary to specify this information to QuickBooks.*

> ***Note:*** *Regarding steps 2-5, in most cases you will use just the payout date as the parameter to specify what is to be included in the file created by the export routine. It is rarely necessary to filter any of the other parameters.*

6. In the **From Payment Account** field choose the bank account for which information is

Copyright 2010, Resaleworld.com, Inc.

to be exported.

7. Enter the account number assigned to the checking account in QuickBooks in the **Checking Account** field. This is usually an account that begins with a *1*, such as *101* or *1001*.
8. Enter the account number assigned to track the Cost of Goods Sold in the **Payout Account** field. This is usually an account that begins with a *5*, such as *5000*.
9. Enter the filename in the File Name field. *Recommendation: use the default file name and path*, which is **C:\RWD\Qbooks.IIF**.
10. Select the **Export** button.
11. After performing a backup of your QuickBooks files (see Important Notes below), **import the Qbooks.IIF** file into QuickBooks.

Warning: Backup your accounting program before importing any files. Taking this safety precaution will ensure that if anything untoward occurs that it may be immediately remedied by restoring your accounting files from your backup.

> ***Note**: Resaleworld offers full support for the QuickBooks export but not for importing information into QuickBooks. Contact Intuit if you require technical assistance importing information into QuickBooks.*

Additional Info

QuickBooks Link

Quicken Export

Why export to, and use, Quicken or QuickBooks?

QUICKBOOKS LINK

Liberty's **QuickBooks (QB) Link** fully integrates Liberty and QuickBooks. The Link is a much more powerful tool then the Export routines that are provided within Liberty. The Link allows you to take full advantage of the power contained in QuickBooks by exporting not just consignor payouts but all accounting related information contained in Liberty. The QuickBooks

Copyright 2010, Resaleworld.com, Inc.

Link is a stand alone program: for purchase information please contact the Resaleworld sales department at (800) 858-1758.

QUICKEN EXPORT

Inventory Module ➔ *Activities* ➔ *Accounting* ➔ *Export* ➔ *Quicken*

Use the Quicken Export to copy payout information from Liberty to Quicken® (made by Intuit). To learn more about why exporting information from Liberty to Quicken is highly recommended, please see the section entitled Why Use a Separate Accounting Program?.

Warning: DO NOT USE QUICKEN TO PAY CLIENTS. Only use Liberty to pay clients. Use the export routine to copy client payout information from Liberty to Quicken. Use Quicken for all other accounting activities such as paying the rent and expenses, calculating payroll, figuring taxes, etc.

Three Very Important Notes

1. For complete integration with QuickBooks, use the QuickBooks Link: it provides much greater power and flexibility. Contact Resaleworld for more details.
2. As a safety precaution, we strongly recommend that you perform a backup of your accounting program BEFORE you import any files. Better safe than sorry.
3. Resaleworld supports the Quicken Export routine in Liberty, but not the import routine in Quicken. Contact Intuit for help using Quicken.

Accounting Link Terms & Definitions

Understanding the following terms will help you understand how to use the Quicken export:

ASCII	(pronounced ask-eee) Stands for **A**merican **S**tandard **C**ode for **I**nformation **I**nterchange. It is a standard format used for representing characters so that files can be shared between programs. Think of it as *universal language* that allows software programs to communicate with one another.

Copyright 2010, Resaleworld.com, Inc.

Export	To send certain information to (out of) a software program (in a format such as ASCII) to a second program.
Import	To receive information from (into) a software program.
File	A file is a collection of information stored as records. Usually the name of a file is in two parts: a filename and extension. The file-name and extension are separated by a period. The name of the Quicken export file is **quicken.qif**
Path	Path means the location of a file or files in your computer. For instance, the Liberty program is contained in the RWD folder (or **directory**), and on most computers the RWD directory is on the C drive. The path to Liberty is thus C:\RWD. When exporting a file using the Quicken export, the default path is C:\RWD. If you were to include the name of the file in the directory, the syntax would be **C:\RWD\QUICKEN.QIF**

The information exported to Quicken includes the following:

1. Payout date and time (the date and time the payout was issued)
2. Amount of the payout
3. Payout number
4. The payee (the person or party to whom the check was paid)

To Run the Quicken Export:

1. Select **Activities** → **Accounting** → **Export** → **Quicken**. The Quicken Export dialog will appear.
2. Enter the from and through Payout Numbers to be exported. *Recommendation: leave these fields blank as it should not be necessary to specify this information to Quicken.*
3. Enter the from and through Payout Dates to be exported. *Recommendation: this is the best filter to use*. Set up a regular schedule to export information, e.g. export the previous month's payouts on the 5th of each month.
4. Enter the from and through **Client Account Numbers**. *Recommendation: leave these fields blank as it should not be necessary to specify this information to Quicken.*
5. Enter the from and through **Client Last Names**. *Recommendation: leave these fields blank as it should not be necessary to specify this information to Quicken.*

Copyright 2010, Resaleworld.com, Inc.

> ***Note**: Regarding steps 2-5, in most cases you will use just the payout date as the parameter to specify what is to be included in the file created by the export routine. It is rarely necessary to filter any of the other parameters.*

6. In the **From Payment Account** field choose the bank account for which information is to be exported.
7. Enter the filename in the **File Name** field. *Recommendation: use the default file name and path,* which is **C:\RWD\Quicken.QIF**.
8. Select the **OK** button.
9. After performing a backup of your Quicken files (see Important Notes below), **import the Quicken.QIF** file into Quicken.

Warning: Backup your accounting program before importing any files. Taking this safety precaution will ensure that if anything untoward occurs that it may be immediately remedied by restoring your accounting files from your backup.

> ***Note:** Resaleworld offers full support for the Quicken export but not for importing information into Quicken. Contact Intuit if you require technical assistance importing information into Quicken.*

Additional Info

QuickBooks Link

QuickBooks Export

Why export to, and use, Quicken or QuickBooks?

FEATURE COMPARISON OVERVIEW

It is recommended that all users read this entire section, as it will give valuable insight into how this version differs from prior versions of the Liberty and Consignment Boutique programs.

Liberty provides the key features found in earlier versions of both Liberty and Consignment Boutique software, while offering an improved feature set that takes full advantage of the power

Copyright 2010, Resaleworld.com, Inc.

of Windows 2000. In essence this new version of Liberty is a blend of Liberty and Consignment Boutique that incorporates the best features of both into one program.

Some of the features listed below will be new for Liberty users, inspiration having been taken from Consignment Boutique. Other features will be new for Consignment Boutique users, inspiration likewise having been taken from Liberty. Still others will be new to both, with inspiration coming from many sources, but most of all from our customers. (We LOVE suggestions! Please e-mail them to us or post them on the Resaleworld Message Board at www.resaleworld.com.)

Related Topics

Key Improvements for All Users

Key Improvements for Liberty Users

Key Improvements for Consignment Boutique Users

Notable Changes for All Users

KEY IMPROVEMENTS FOR ALL USERS

- New item entry fields, including tag quantity, item status, retail price, and cost (for retail items).
- Ability to inventory and sell retail items (as opposed to consigned items). This includes the use of UPC, Product Codes, SKU's, minimum and maximum quantity, reorder quantity, and much more.
- Ability to purchase items outright from individuals by selecting **Purchase** instead of **Consign** as the Form of Acquisition. See also Definition of Consigned, Purchased, and Retail Items.
- Built in backup and restore. All earlier versions only used the backup and restore of either the operating system or a third party program chosen by the user - the new backup and restore are now part of the program.
- Item entry and account windows allow for greater customization to meet your needs.
- Predefined Categories, Attributes, and Brands help you consistently describe items added

Copyright 2010, Resaleworld.com, Inc.

to Liberty, while a text field allows you the flexibility to enter additional item information.

- Product Lines for reporting across category boundaries.
- Point of Sale is faster and more customizable.
- Improved tax handling.
- Layaways are easier to post and manage.
- Deductions from clients made on a per item basis.
- Fee for Returned Items.
- Commission Tracking by requiring User Logins at Point of Sale and then generating a Sales - End of Day report.
- Date, time and user stamp on Comments (formerly **Notes**).
- Improved audit reporting by requiring User Logins and then generating appropriate reports.
- Improved internal consistency strictly maintains data integrity for increased reliability.
- Customizable account screen.
- Customizable item entry screen.
- Sticky browse windows let you permanently reorder/rearrange fields on various screens, including the Inventory, Transaction, Payout, and Point of Sale screens).
- New data engine for enhanced reliability.
- More inventory and account related default settings to speed account creation inventory entry.
- More PoS default settings to make sales transactions faster and more convenient.
- E-mail and web addresses can be kept on file for all accounts.
- Many new types of price tags and price labels may be printed, with more planned for the future.
- Spell checking for item descriptions.
- Many fields use auto fill to speed data entry.
- New Pick List and Activity reports.
- Many new reports.

Related Topics

Key Improvements for Liberty Users

Copyright 2010, Resaleworld.com, Inc.

Key Improvements for Consignment Boutique Users

Notable Changes for All Users

KEY IMPROVEMENTS FOR LIBERTY USERS

- Consignor, customer, store, and retail account files are now combined into one single file. This eliminates switching back and forth and improves data integrity.
- Retail merchandise handling is much improved.
- Markdown by Color
- New item entry fields, including Brand, Store Section and Tax Type.
- All accounting transaction now appear in one Transactions screen instead of in three screens (Payout History, Deductions, and Credit on Account).
- Easier to use annual billing fee routine
- Ability to add new credit card and other payment methods
- Expire post no longer creates a new item when an item is posted as expired. Instead every item has a Status. When an item sells it is given the status **Sold**. When an item sells after expiration it is given the Status **Expired**.
- Group Item Post has been enhanced and is now found under **Activities** → **Post Items** on the **Multiple Items** tab.
- To view Sales Totals, simply look at the bottom of the Transactions window.

Related Topics

Key Improvements for All Users

Notable Changes for All Users

Copyright 2010, Resaleworld.com, Inc.

Key Improvements for Consignment Boutique Users

- Consignor payouts based on a specific time period. (This is a long sought feature for many Consignment Boutique users.)
- Print Flags are no longer used when printing price tags. (Liberty also does not contain Account Flags.)
- Inventory filtering makes analyzing account activity easier and more convenient.
- (Quick) Item Lookup
- Export to Quicken & QuickBooks: Liberty does not contain any accounting capabilities as did Consignment Boutique. This is viewed as an improvement because Quicken® and QuickBooks® are vastly superior in ease of use, flexibility, and power.) QuickBooks® is recommended over Quicken® as it was designed to handle small business finance instead of home finance.
- New Price Code field in item entry provides greater power and flexibility for handling consignment splits, markdowns, and item fees.
- Accounts can have multiple addresses, phone numbers, and e-mails
- Ability to handle retail inventory, with multiple identical items, cost, minimum and maximum quantities on hand, reorder points, UPC and SKU's etc.
- The Pay Delay routine allows you to specify a certain time period must elapse before consignors are paid.
- Transaction information has been consolidated into one window.
- Enhanced data integrity and robust database eliminate the worries of corrupted data.
- Payout History screen
- Unlimited consignor splits, markdown schedules, and item fees
- Variable rate splits based on time or selling price.
- Suspend sale in PoS.
- Group Posting of items donated, returned, etc.

Related Topics

Copyright 2010, Resaleworld.com, Inc.

Key Improvements for All Users

Notable Changes for All Users

NOTABLE CHANGES FOR ALL USERS

- To give greater precision in identifying items, the Type field has been replaced by the Category field.
- Attractive, easy to view Microsoft Outlook® style buttons now appear on screen. These may be turned on and off if you wish – see Set Up General Defaults for details.
- Consignment Boutique style dot matrix price tags are not supported by Liberty. Customers may trade in their price tags at no charge for any price tag style that is supported by Liberty.
- To reverse a sale it is necessary to use the Refund routine in Point of Sale. It is no longer possible to Unpost a sale. This conforms with standard accounting procedures, because refunding a sale leaves a detailed audit trail whereas unposting an item does not.
- **Unpost** is used only to change the status of item's that were posted as Donated, Returned, or Other.
- Point of Sale must be used to sell items. Items can no longer be posted as sold using Post Sales. Post Sales is now only used to post items as donated, returned, or **other**. This changes allows for full audit control of all sales transactions and ensures data integrity. Sales can still all be posted at the end of the day as with Post Sales in former versions; it is simply necessary to do this in Point of Sale instead.
- Consignors and customers are now combined and known as **Clients**. Also included in **Clients** are individuals or businesses from who unique merchandise is purchased outright. This eliminates duplication of account information while retaining the ability to segregate consignors and customers when printing mailing labels, client lists, and running reports.
- Simply view the bottom of the Transactions window to determine at a glance how much is owed for an account.
- In past software versions, if there were too many items to fit on a check stub, the next check printed would be void and the list of items paid continued on the stubs. This no

Copyright 2010, Resaleworld.com, Inc.

longer occurs - voided checks are no longer printed solely to show the rest of the items being paid on the stub(s). (The format and descriptions printed on checks has been changed to fit more items on a stub.)

- Payouts are no longer deleted. They are reversed instead. What happens is **Reverse Transaction** is created and recorded. This way it is possible to see **exactly** what has transpired within an account's payout history. This conforms with standard accounting procedures, because reversing a payment leaves a detailed audit trail whereas deleting a transaction does not.
- A number of routines and/or fields no longer allow users to enter whatever they wish, but instead are set up ahead of time using a **Maintenance** routine. In Liberty Inventory, routines and fields using a Maintenance routine include Expire Group, Fee Frequencies, Filter Codes, Sections, Transaction Definitions, and Payment Accounts. In Liberty Point of Sale routines and fields using a Maintenance routine include Terminals, Fee Types, Payment Types and PLU's. For a complete list of all routines that require advance set up, see Set up Checklists.
- Markdown codes have been renamed **Price Codes**, and no longer handle taxes. (Use Tax Codes and Product Lines to set up taxes in the system instead).
- Reports have been redesigned to accommodate the new database. This means that generating reports is different, reports now contain somewhat different information, and the layouts of reports has changed.
- There are currently no Purge routines in Liberty. The reason is that because hard disk space is virtually unlimited, and the manner in which Liberty is programmed means there should be essentially no difference in overall speed whether working with a small or large set of data. The benefit to this is improved data integrity and security against data tampering, such as by employees stealing from the store who are seeking to cover their tracks. Following are some additional details of what has changed:
    - Individual items can be deleted one at a time, but there is no ability to purge items system wide.
    - Accounts cannot be deleted.
    - Payouts cannot be deleted, however, they can be reversed in the event of a mistake.
    - Sales information cannot be deleted.

Resaleworld will continue to evaluate the Purge routines in the event that speed or other factors become an issue.

Related Topics

Key Improvements for All Users

Key Improvements for Consignment Boutique Users

Key Improvements for Liberty Users

Copyright 2010, Resaleworld.com, Inc.

AUTO FILL

Auto filling is when the software searches ahead as you type to find the exact match for the word or phrase. The purpose is to save keystrokes, thus making information entry more efficient.

For example, when typing the color purple in the Color Attribute field, typing "P" will bring up Peach. Typing "PU" will bring up PUrple. At this point it is not necessary to type the rest of the word. Just press <Enter> and the entire word (purple) will be inserted.

OVERVIEW OF THE ITEM ENTRY PROCESS

Liberty is designed to handle all of the steps required to quickly and efficiently list items online for sale at auction. Following is a brief overview of the item entry process, in order, for auctioning items:

1. On the **Item Detail** tab, enter specific information relating to the item itself, such as the description, price, and consignment split.
2. The next step is to click on the **Auction Detail** tab to enter Auction specific information. The Auction Detail tab contains four sub-tabs of its own:
    a. The **Shipping Info** tab for entering shipping information such as the shipping method, size and weight of the item, handling fee, etc.
    b. The **Photos** tab for attaching photos to the item. These photos are uploaded to the auction web site along with the rest of the information provided.
    c. The **Auction Info** tab for auction specific information such as items' Online

Copyright 2010, Resaleworld.com, Inc.

Category, Duration, Starting Bid, Reserve, Auction features such as boldface and Buy It Now, etc. The HTML Template used to create the Auction Ad for this item is also selected on this tab, and you may preview the listing to see how it appears with the template selected before uploading it to the auction web site.

d. The **Finish** Info tab, which displays either:

   i. What information must still be provided before the item can be uploaded for listing online, or, if all information has been provided,

   ii. Allows you to mark the item as **Ready** for uploading and to specify the date and time the listing should be uploaded.

Once an item is **Ready**, it is uploaded to the auction web site using Liberty's **Synchronization** feature. Synchronizations are performed using the **Order Manager**.

ADDING INVENTORY

Liberty's flexibility gives you the power to handle your inventory pretty much any way you desire. As a result there are a good number of fields and options available in the Item Entry process. You will find that not all of them will be necessary for you to conduct business.

The purpose of this Tutorial is to help new users get started using Liberty quickly and effectively, but without going into exhaustive detail on each and every field and possibility. Accordingly not every field and capability is described in this Tutorial. More information on the meaning and use of specific fields and processes is available in other sections of the manual and Help system.

Liberty handles three types of inventory items: consigned, purchased from individuals, and purchased from companies for retail sales. Following are the definitions of these terms:

Consigned: An item brought in by a client - usually an individual - that is sold on consignment. The client is paid a percentage of the item's selling price if (and only if) the item sells. The client is not paid until after the item sells. Consigned items must be:

Entered into accounts with an Account Type = Client or Store Account, and

With the **Form of Acquisition** = **Consigned**.

Purchased: an item brought in by a client - usually an individual - that is purchased from the client immediately. Purchased items must be:

Entered into accounts with an Account Type = Client or Store Account, and

Copyright 2010, Resaleworld.com, Inc.

With the **Form of Acquisition** = **Purchased**.

Retail: an item that is purchased from a **Retail Vendor**. Often these items are bought in quantity - for instance, a dozen identical earrings or five identical lamps. Retail items must be entered into accounts with an **Account Type = Retail Vendor**. **There is no Form of Acquisition choice**, as retail items are always purchased.

Important Note: Items entered as Consigned or Purchased may be put up for auction on an auction web site such as eBay. Items entered as Retail items may not be put up for auction.

THE IMPORTANCE OF CONSISTENCY

To get the greatest benefit from using Liberty, an important concept which should be understood is that of **consistency** when entering item information. One of the reasons for maintaining consistency is that there are several quite useful methods for looking up particular items based upon their descriptions. These include

1. When an item has no tag and it must be identified in order to credit the correct consignor with a sale, and
2. For fulfilling customer requests logged in the Wish List. (When a customer cannot find an item, and asks to be notified when such an item becomes available, the request is recorded in the Wish List. By cross referencing requests recorded in the wish list with items actually on file at a later date, customers and items can be matched to one another, generating both increased sales and customer appreciation.)

In order for the system to be able to find the consignor of a particular item based on the description of the item, or to effectively cross reference a wish, there must be as much consistency as possible when entering items into inventory. Why is this?

Although a human being understands that the abbreviated phrase **Grn Shor** means **Green Shorts**, a computer cannot make such a distinction when other items are described with fully spelled out words.

What everyone entering information needs to do is use to the exact same format in terms of spelling for describing and labeling items. Since no two people are alike, and people are naturally forgetful (making them all too human), drop-downs and pop-up windows have been included in this program to help solve the problem of consistency. Besides adding a great deal of

Copyright 2010, Resaleworld.com, Inc.

consistency, another positive benefit of drop-downs and pop-ups is they have the capability to dramatically increase the speed with which information is entered into the system. There is no doubt that the increased consistency and efficiency gained from using drop-downs and pop-ups is highly beneficial to the bottom line.

Related Topics

Wishlist Overview

Find an Item using Item Lookup

Using Drop-downs and Popup Windows

ENTERING INVENTORY ITEMS' INFORMATION

Inventory Module ➔ *Task* ➔ *Add Item*

Liberty is designed to be highly flexible, which gives you the power to handle your inventory pretty much any way you desire. Follow the steps outlined below to enter items that are either

- Consigned
- Purchased Outright from an individual (not a company).

Do not use these instructions for entering items into a Retail Account. For information on how to enter items that are purchased from a company to be sold at retail, please see the section entitled Add Retail Items.

> ***Note:*** *Before adding One of a Kind items, you must create an account for the client whose merchandise you plan to sell.*

Before you begin adding items to Liberty, it is **STRONGLY RECOMMENDED** that you perform the steps necessary to setup Liberty's inventory processes properly. Please pay particular attention to the sections on Categories and Price Codes prior to starting to use Liberty. It also highly recommended that you start out in Training Mode. Using Training Mode will prevent any mistakes you make while learning Liberty from having any impact on your business.

Copyright 2010, Resaleworld.com, Inc.

Note: *When a variety of choices for performing a task are provided, the term* ***recommended*** *will appear next to the choice felt to be the overall best choice from those available.*

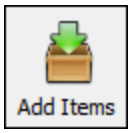
To Add One Of A Kind Items:

Follow the instructions below to enter item information. When finished, select the **Save** button. If you do not save your changes by clicking the **Save** button the information entered will not be saved.

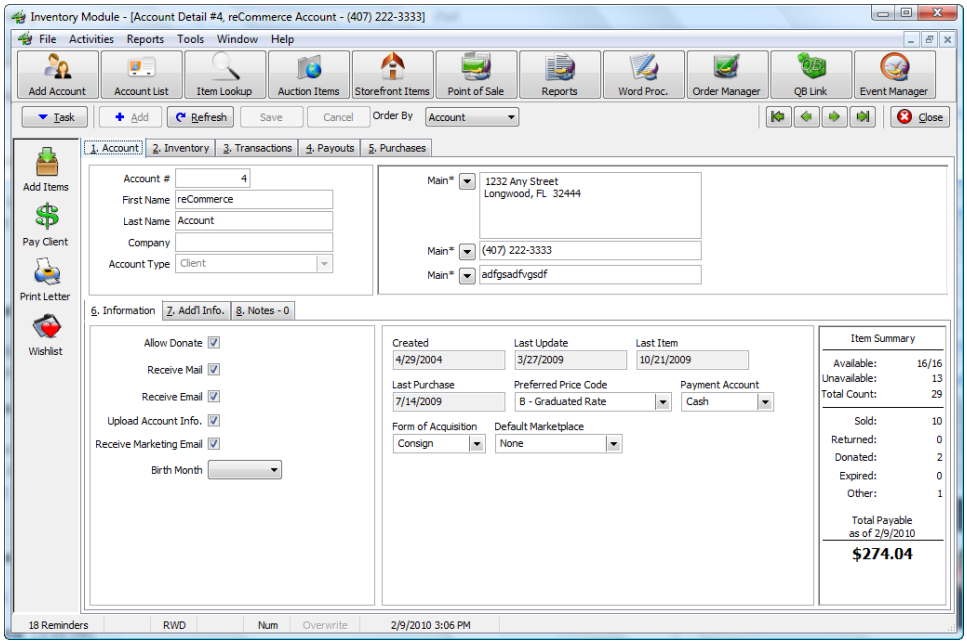
When finished entering items, select the **Stop** button. To close the Item Entry dialog, click the **Close** button.

Note: *It is not necessary to enter information in every field. In fact, the only fields that require the user to enter information every time an item is added are the Category and Price fields. All of the remaining fields are either filled in automatically based on default settings, or else they don't usually need information entered.*

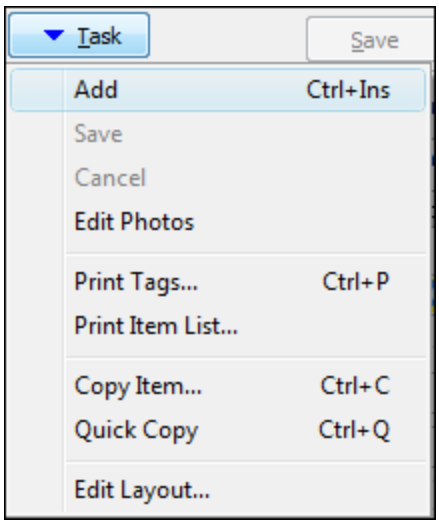
1. **Lookup Account**. Lookup the account you wish to add inventory to.
2. **Select Add Item**. Do any of the following:
    a. Click on the **Add Items** icon, located on the left side of the screen just under the Task button (recommended and below), or



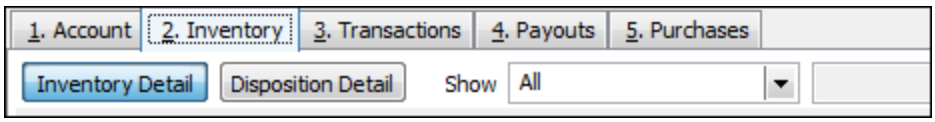
Copyright 2010, Resaleworld.com, Inc.



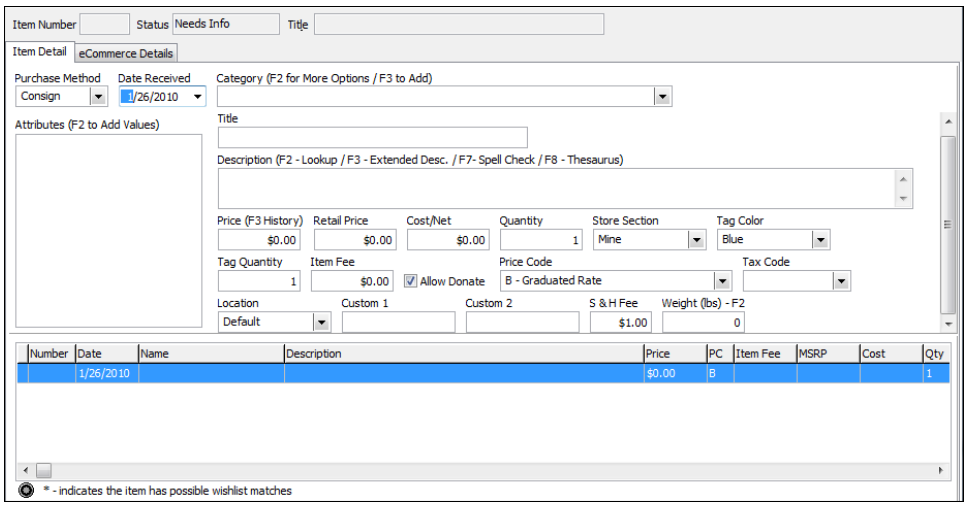
b. Click on the **Tasks** button, then on **Add** (below), or



c. Select the **2. Inventory** tab by either clicking on it or pressing <Alt> <2>. Click the **Add** button.



The Item Entry window will display with the cursor will be in the **Date Received** field (below).



3. **Date Received** (required field). Today's date will automatically appear. If you need to change the date, type it in using MM/DD/YYYY format, or click on the drop-down and select from the calendar that displays.

Before proceeding, note the **Purchase Method** (required field, but automatically filled in based on default setting). Purchase Method is located to the left of the **Date Received** field. The Purchase Method will be either **Consign** or **Purchase**, depending on the default setting for this field. Make sure the correct method is selected, and if not, change it.

To Change Default Setting for the Purchase Method field:

To change the default Purchase Method for just the account you are currently in, look for the **Form of Acquisition** field on either the **1. Account screen** or the 6. Add'l Info screen and change the method as needed.

To change the default Purchase Method for all accounts, from the **Main Menu** select **Tools** → **Options** → **Account**, and change the **Form of Acquisition** default. See the section entitled Set Up Account Field Layout for more information.

4. **Category** (required field). After making sure the Date Received and Purchase Method are correct, press the <Enter> key to move on to the Category field. Don't use the mouse – entering inventory is much faster when you keep your hands on the keyboard as much as possible – see the section entitled Keyboard Shortcuts for more information.

> ***Note:*** *Categories are best setup prior to beginning to enter items – for a full discussion and description of Categories, please start by referring to Categories Overview for more information.*

Choose the appropriate **Category** by either:

a. Typing the **Category** you wish to enter (recommended, as this is the fastest way), e.g. *blouse* or *table*, or

b. Pressing **<F2>** and selecting from the list presented in the **Select Category** popup, or

c. Clicking on the drop-down and selecting the appropriate Category.

If the **Category** you need is not in the system, either

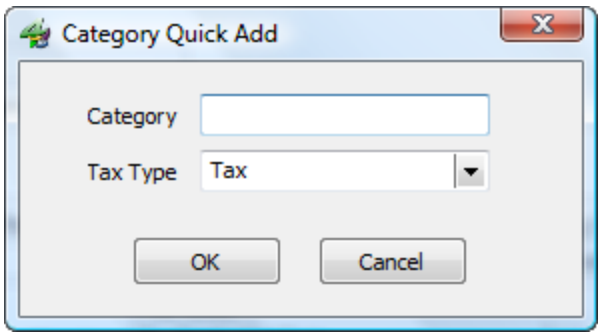
a. Go to **Tools** → **Categories** and enter the Category using the Category Editor (recommended), or

b. Press **<F3>** with the cursor in the Category field and use the **Category Quick Add** popup to add the Category.

To Add a Category with the Category Quick Add popup:

a. Place the cursor in the Category field.

b. Press **<F3>**. The **Category Quick Add** popup will display:



c. Enter the name for the new entry in the **Category** field.

d. Select the **Tax Type** that is appropriate for the Category from the drop-down list.

e. Click **OK**. An error message will display if you have entered a duplicate Category.

5. **Brand** (optional field). After entering the Category press <Enter> and the cursor will advance to the **Brand** field (the manufacturer's name). Entering information in this field is optional, so if you wish to leave the field blank press <Enter>. The cursor will advance to the first **Attributes** field.

   To enter a Brand, type the Brand name, then press <Enter>. If the Brand is not in the system, you will be unable to enter the Brand until you add it to the Brand list - do so by pressing the <F2> key and entering the Brand using the **Add New Brand** popup which appears. Brands may also be added using the **Category Editor**, which is reached by clicking on **Tools** → **Categories**, then clicking on the Brand tab.

Copyright 2010, Resaleworld.com, Inc.

Once the Brand appears in the Brand field, press <Enter> to advance to the first **Attributes** field.

6. **Attributes** (optional field). Each Category may have one or more **Attributes** associated with it. Entering Attributes is optional, so if you wish to leave an Attribute field blank press the <Enter> key to advance to the next Attribute field, or press the <Tab> key to advance to the Description field. (Many users skip Attributes and enter descriptive information about items in the Description field instead.)

   To enter an Attribute, type the Attribute Value (by **Value** we mean, for instance, the word *Large* being used in the Size field, or word *Red* in the color field). You may also choose from the drop-down list.

   If the Attribute Type or Attribute Value you wish to enter is not in the system, you will be unable to enter the Attribute until you add it to the Attribute List. This is accomplished using the Category Editor, which is reached by selecting **Tools** from the **Main Menu**, then **Categories**, then selecting the **Attributes tab**.

   Once the Attributes have been entered, press <Enter> or <Tab> to advance to the Description field.

7. **Description** (optional field). Use this field to describe the item. If you are not using Attributes, use this field to describe the item in as much, or as little, detail as you wish. If you are using Attributes, do not repeat information in the Description field, as doing so is redundant and wastes time. When finished, press <Enter>.

   Pressing **<F2>** will cause the **Description Lookup popup** to appear. Use this popup to save time by entering frequently used Descriptions. This is particularly useful for slow or non-typists.

   To run a **Spell Check** on the text entered in the Description field, press **<F7>**.

   To find synonyms for a word in the Description field, press **<F8>** and the **Thesaurus popup** will appear.

8. **Price** (required field). Enter the selling price for the item, then press <Enter>. If the price is a whole dollar amount, e.g. $10.00, just enter the dollars and press <Enter> - it is not necessary to enter the .00 as this will be automatically filled in. See the section on Price Extensions for more details.

9. **Retail Price** (optional field). Retail Price represents the original retail price for the item. This price may be printed on the price tag with the term **Original Price** appearing ahead of this retail price. This is a good selling feature, as it lets the customer know the value of the item when it was originally purchased

Copyright 2010, Resaleworld.com, Inc.

Example: A table in good condition being sold for $95.00 might have originally cost $395.00. Putting $395.00 in the Retail Price field will cause **Original Price: $395.00** to be printed on the price tag.

Price Code (required field, but automatically filled in based on default settings). The primary purpose of the Price Code is to specify how the sale price of a consigned item is split between the store and the client. It also controls automatic markdowns, items fees, and other factors that affect the sale of One of a Kind items.

Price Codes **must** be setup before the system is put into use. Do not enter, much less sell, items before the Price Codes have been setup. See the section entitled Price Codes for more details.

The default Price Code for all accounts is Price Code **A**, however, this may be changed (see below). For convenience, each account also has its own default Price Code. See the section entitled Define Default Information for Accounts.

To Set or Change an Account's Default Price Code:

10.

a. Lookup the Account.

b. Click on the **6. Add'l Info** tab.

c. Click on the **Preferred Price Code** field's drop-down and select the default Price Code.

d. Click the **Save** button.

11. **Cost/Net** (optional for consigned items, required for purchased items). **The use of this field depends on the Purchase Method:**

When Purchase Method = Purchase: enter the amount to be paid to the Seller for the item. An amount MUST be entered.

When Purchase Method = Consign: leave this field blank (zero) UNLESS you wish to assign a **Preset Net** amount to the item.

A **Preset Net** is an amount entered into the net field to guarantee the consignor receives a specific amount of money if the item sells instead of an amount based on a percentage of the sale. For example, if a consignor brings in an expensive item, she might say *I don't want you to sell this item unless I get at least $450 for it.* You figure you can sell it for $600 - $700, but since you usually sell items based on a 50/50 split, to accept this item an exception must be made.

By entering $450 in the Cost/Net field, the consignor is guaranteed that no matter how much the item sells for, she will receive $450. This is because any figure other than zero

Copyright 2010, Resaleworld.com, Inc.

entered into the Net field will **override** the regular consignment split (which is defined by the item's Price Code).

> ***Note:*** *Price tags for items with a Preset Net contain a series of numbers instead of the letter(s) denoting the Price Code. This series of numbers is the Preset Net to the consignor in coded form. $450.00 will appear as 100450001. Drop the 1's and leading 0's, place a decimal two places in from the right, imagine a dollar sign dancing in front of your (consignor's eyes in this case) and you have $450.00.*

12. **Tax Code** (required but rarely changed field). While information is required to be entered in this field, it is rarely necessary to change this field. This is because the Category controls the Tax Code. In other words, when you enter the Category, the Tax Code is automatically assigned to the item at that same time.

    Since similar items with the same Category will rarely if ever be taxed differently, it is highly unlikely you will ever need to enter anything in this field. (In other words, why would one blouse have a tax rate of X% while another blouse has a different tax rate of Y%.) See Categories Overview, Set up Tax Codes, and Set Up Product Lines, for more information.

13. **Allow Donate** (required field, but automatically filled in based on default setting). If this box is checked than the item may be donated if it does not sell. If the box is not checked then the item can not be donated - a message will appear stating **Donation is not allowed for this item**. (Items are donated using the Post Sales routine.)

    The purpose of this field is to allow you to ensure items that should not be donated – those that should instead be returned to the client or kept in the store for some other reason – are not inadvertently donated.

    When accounts are created they default to allowing all items to be donated. If you have a client who does not wish to have any items donated, you can specify that no items in this particular client's account will be donated by following these steps:

To Change The Do Not Donate Default For An Account:

a. Lookup the Account.

b. Click on the **6. Add'l Info** tab.

c. Click on the **Allow Donate** check box to remove the check mark..

d. Click the **Save** button.

For additional information, see also Define Default Information for Accounts and Additional Info.

Related Topics

Copyright 2010, Resaleworld.com, Inc.

Set Item Entry Field Preferences

How to Enter Items Faster

Keyboard Shortcuts

Set Item Entry Field Preferences

ENTERING AN ITEM'S AUCTION INFORMATION

Accounts → 2. Inventory Tab → Add → eCommerce Details Tab

Once you have finished entered the basic inventory information about the item, you can enter the remainder of the Auction Information by clicking on the **Auction Detail** tab. Here you can assign shipping and eBay auction parameters and photos.

The **eCommerce Detail** tab contains four (4) sub-tabs of its own:

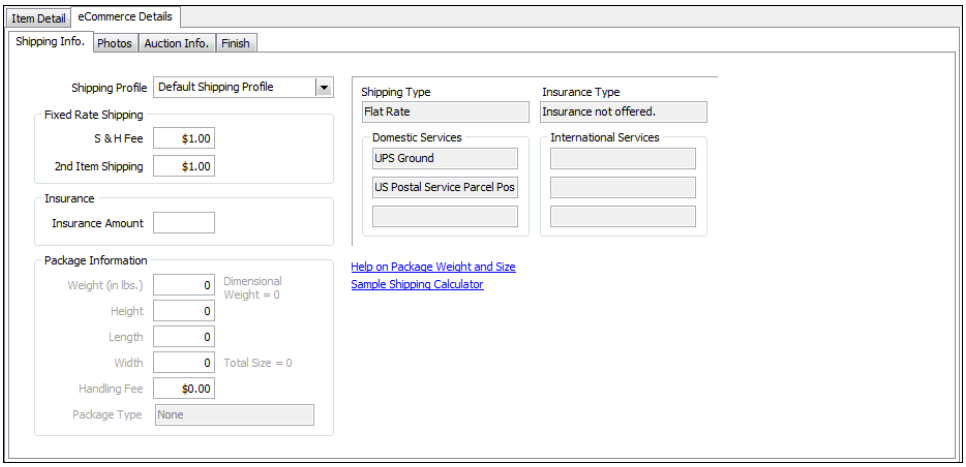
1. The **Shipping Info** tab for entering shipping information such as the shipping method, size and weight of the item, handling fee, etc.
2. The **Photos** tab for attaching photos to the item. These photos are uploaded to the auction web site along with the rest of the information provided.
3. The **Auction Info** tab for auction specific information such as the Online Category of the item, the Duration, Starting Bid, and Reserve for the auction, Auction features such as boldface and Buy It Now, etc. The HTML Template to be used to create the Auction Ad for this item is also selected on this tab, and you can preview the listing before it is uploaded to the auction web site.
4. The **Finish** Info tab, which displays either:
    a. What information must still be provided before the item can be uploaded for listing online, or, if all information has been provided,

Copyright 2010, Resaleworld.com, Inc.

b. Allows you to mark the item as **Ready** for uploading and to specify the date and time the listing should be uploaded.

Once an item is **Ready**, it is uploaded to the auction web site using Liberty's Synchronization feature.

Shipping Info Tab



Use the **Shipping Info Tab** to specify shipping specific information. This information is then included in the Auction Ad. This essential information allows buyers to incorporate all costs into their calculations as they bid for items being auctioned or when they purchase items at a fixed price (i.e. Buy It Now items).

When shipping, it is necessary to understand the definition of two terms:

1. **Flat Rate** means the shipping fee is the same no matter where the purchaser is located within the U.S.
2. **Calculated Rate** means the amount of the shipping fee will depend on the shipping company's charge for shipping from your location to the purchaser's.

When you indicate the method of shipping when adding your item, Liberty will send the selected shipping information to eBay based on these values.

Enter Shipping Info:

1. Make the appropriate selection from the **Shipping Profile** drop-down. Liberty initially comes with two methods to choose from (more may be added under **Tools** → **Ecommerce Options** → **Shipping Info**):
    a. **Flat Rate**. This requires you to set the S&H (shipping and handling) Fee in the following field. You may optionally enter an amount charged if the buyer purchases a

Copyright 2010, Resaleworld.com, Inc.

second item simultaneously. This is accomplished in the **2nd Item Shipping** field.

b. **Calculated**. Selecting Calculated as the Shipping Type allows auction buyers to determine for themselves the amount of the shipping based on the zip code of the destination to which the item will be shipped. Auction buyers accomplish this by clicking on the **Shipping Calculator** link in the **Auction Ad**.

Entering the shipping information when the item is listed allows eBay's Shipping Calculator to determine U.S. Postal Service and UPS shipping charges within the 50 United States based on the buyer's zip code.

When Calculated is selected as the Shipping Profile it is necessary to enter the Weight, Height, Length, Width, Handling Fee, and Package Type in the **Package Information** fields located below. This information is required in order for the Shipping Calculator to accurately determine the shipping cost.

While the shipping calculator supports most purchases on eBay, you should instruct Buyers to contact you when they

- Want the item shipped outside of the United States,
- Wish to use a different shipping service than what's shown in the calculator (e.g. when they want UPS Next Day Air shipping but the shipping calculator shows rates for UPS Ground), or
- When a buyer purchases multiple items which, when shipped together, should reduce shipping costs.

Note:** The default Handling Fee is specified on the **Tools** → **Ecommerce Options** → **Shipping Tab.

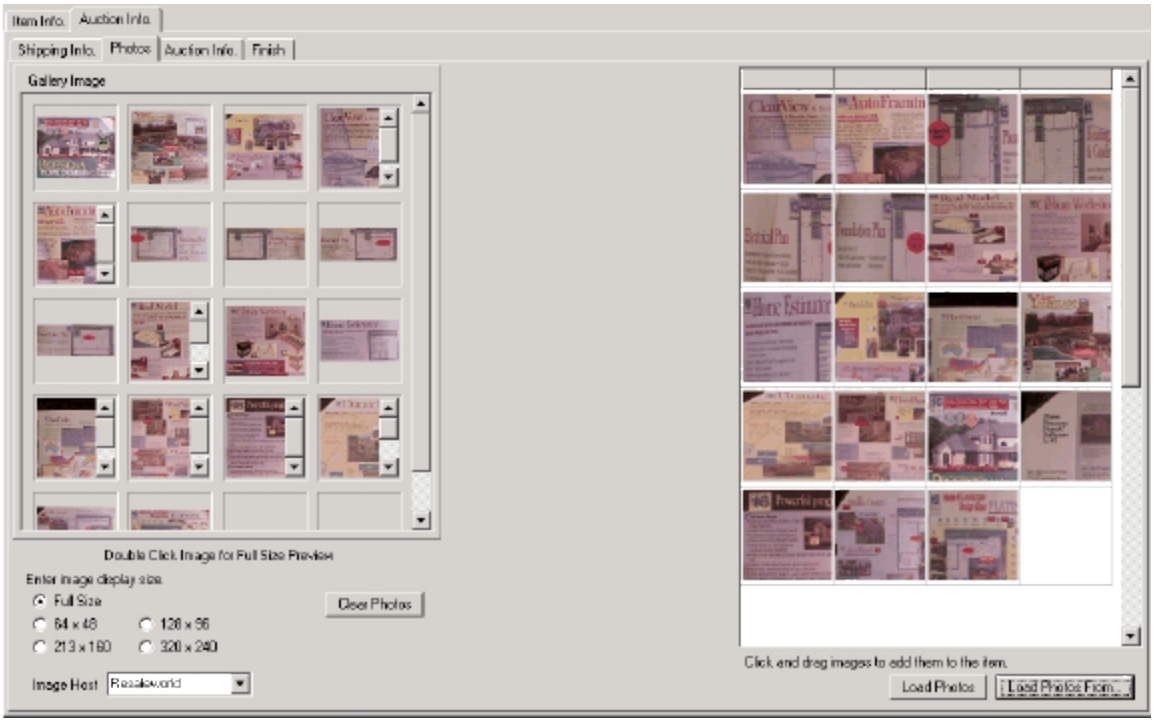
2. Enter the amount added for insurance in the **Insurance Amount** field. The **Insurance Type** field, which is located on the **Maintain Shipping Profiles** dialog (reached by selecting **Tools** → **Ecommerce Options** → **Shipping Info** and then selecting the **Edit** button) controls whether or not this field is active for a particular Shipping Profile. Please see the section entitled Set Up Ecommerce Shipping Options for more information.
3. When finished entering information on this display, click the **Save** button. At this point you may wish to proceed to one of the other tabs, wait until later to enter additional information, turn over the responsibility for entering the other required information to another person, click on the Item Info tab and begin adding another item, etc.

Related Topics

Set Up Ecommerce Shipping Options

Copyright 2010, Resaleworld.com, Inc.

Photos Tab



Use the **Photos Tab** to select the images to be included in the auction's Photo Gallery. The Photo Gallery is a part of the Auction Ad. Up to 20 photos may be selected for each auction. Remember that a picture may be worth a thousand words, but the quality of your pictures will make a significant difference in your perceived professionalism among both buyers and sellers.

Of equal importance is the size of the photos in your Auction Ad. The larger the photo's file size, the longer it will take potential buyers to download the web page, especially if they are on a dialup connection. You will need to strike a balance between making the photos large enough for viewers to effectively see the product, without being too large (or too numerous).

To Add a Single Photo to an Auction:

1. Right-click on any of the squares in the **Gallery Image** panel (located immediately below the **Photos** tab). A menu will appear. (Do not click on the border between each square – the menu will not appear if you do.)
2. Select **Load Single Photo** from the menu that appears.
3. Navigate to the photo to load in the **Open** dialog that appears.
4. Highlight the photo file to load and select the **Open** button.

Copyright 2010, Resaleworld.com, Inc.

To Add Multiple Photos to an Auction:

1. Click on either the **Load Photos** or the **Load Photos From** button (located at the extreme lower right of the screen). The difference between the two is this:

    a. **Load Photos** looks to the default location for the images, as specified in Camera Directory field, which is located under **Tools** → **Ecommerce Options** on the **General** tab**.**

    b. **Load Photos From** allows you to browse your system for the photos.

    All of the photos in the directory specified in step 1 will appear on the right side of the screen.

2. Click and drag the images you wish to include in the auction's Photo Gallery over to the left side of the screen. **Be sure to drag the images in the order you wish them to appear online.**

    To see a picture in its actual size, double-click on it in the Gallery. If desired, you can perform some rudimentary photo manipulation here as well. You can resize, crop, change the contrast and/or brightness, and rotate the photo if desired.

3. Select the **Image Display Size** you wish the images to appear online by selecting one of the five Image Display Size's . Note that this selection is controlled by a default setting located under **Tools** → **Ecommerce Options** on the **General** tab.

4. Select the **Image Hosts**. Note that this field is controlled by a default setting located under **Tools** → **Ecommerce Options** on the **Image Hosts** tab.

5. When finished entering information on this display, click the **Save** button. At this point you may wish to proceed to one of the other tabs, wait until later to enter additional information, turn over the responsibility for entering the other required information to another person, click on the Item Info tab and begin adding another item, etc.

To Resize, Crop, Change Contrast And/Or Brightness, And/Or Rotate A Photo:

1. Double-click on the photo in the Photo Gallery (on the left side of the screen). The Image Preview dialog will appear in its actual size.

2. Make changes as desired.

3. Click **Save** when finished, or **Cancel** to abandon your changes.

To Remove a Single Photo from the Gallery:

1. Right-click on the photo to be removed. A menu will appear. (Do not click on the border between each square – the menu will not appear if you do.)

2. Select **Remove Image** from the menu that appears.

Copyright 2010, Resaleworld.com, Inc.

To Clear All Photos from the Gallery:

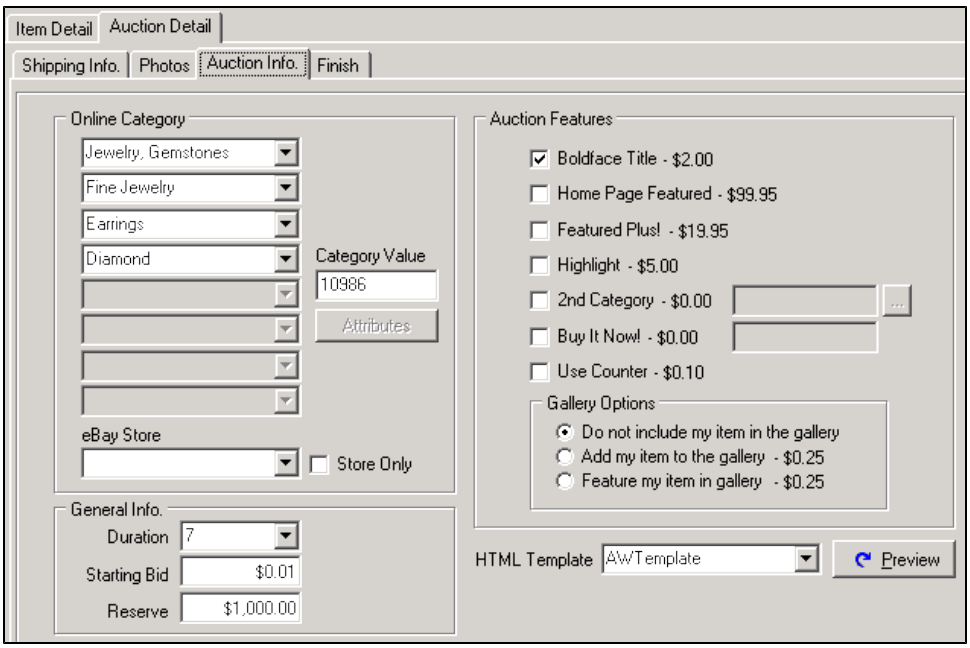
1. Click the **Clear Photos** button to clear all of the photos from the gallery. Note that this action cannot be undone.

Related Topics

General Ecommerce Set Up

Set Up Image Hosting

Auction Info. Tab



The **Auction Info** tab is used to enter auction specific information. Auction information includes the duration of the auction, the minimum starting bid, a specific category for the item being auctioned, etc.

In addition you may utilize the pre-built HTML ***templates*** that organize the information within your auction (i.e., description, shipping information, pictures, etc.). Within these templates, you can include specialized (HTML) ***tags*** which are pre-filled with information from the item description. You can use an HTML editor such as Front Page or a text editor to insert tags that will tell your customized web page where to find the fields in the Ecommerce module that outline your Policies, Shipping Procedures, etc.

Liberty comes with 16 pre-built templates which you can use to advertise your auctions.

Copyright 2010, Resaleworld.com, Inc.

To Enter Auction Information:

1. **Online Category**. Use the **Online Category** drop-down menus to select the eBay category for the item, or, if you know the **Category Value**, enter it in the Category Value field. (Every eBay Online Category has a unique Category Value assigned to it by eBay.)

   Note that the online category is different then the Categories which you set up within Liberty. This is because eBay's categories constantly change and are designed for the benefit of eBay and its users, whereas the Categories within Liberty are designed by you for your specific needs.

   Note also that Liberty downloads eBay categories automatically so to keep them up to date within your system.

2. If you select an Online Category which allows eBay **Item Specifics**, the **Attributes** button will be enabled. Click the Attributes button to set the Item Specifics for each auction.

   Item Specifics are details that are specific to a Category. For example, rings would use gemstone as an Item Specific, Cars would use manufacturer, model, cylinders, etc.

   Note: Liberty downloads eBay Item Specifics automatically to keep them up to date within your system.

3. **eBay Store**. If you have set up an eBay store, you may assign a store category for this auction. Go to **Tools** → **Ecommerce Options** → **eBay Settings** to assign your store category names.

4. **Store Only**. Check this box to send the item to the eBay store only, and not to the eBay marketplace.

5. **Duration**. Choose the length of the auction from the drop-down. Choose 99999 for an eternal duration (generally for items listed for sale in an online store in a non-auction environment).

6. **Starting Bid**. Enter the amount of the starting bid amount in the **Starting Bid** field. This is the amount that the first bidder must, at least, bid.

7. **Reserve**. If you wish to set a Reserve for the item, enter the amount in the **Reserve** field. The Reserve price represents the LEAST amount that you are willing to accept for the item. If the auction finishes with no bid reaching the reserve, then the item is not sold.

   For example, if an item's retail price is $125.00 you may enter a reserve of $100.00 to cover the hard cost of the item, shipping, and a still return a small profit. A Reserve price can help prevent you from losing money on an auction.

8. **Auction Features**. Click on the check boxes in the various **Auction Features** to select auction features that you wish to utilize in the auction.>

Copyright 2010, Resaleworld.com, Inc.

> ***Note:*** *The cost next to each feature represents the fee you wish to charge the consignor's account: it is not the amount eBay charges. This allows you the flexibility to charge consignors whatever amount, if any, for these various features you see fit. To set these amounts, go to* ***Tools*** → ***Ecommerce Options*** *and select the* ***Marketplace*** *tab. See the section entitled Set Ecommerce Marketplace Options for more information.*

9. **Gallery Options**. Select one of the three **Gallery Options** provided. Use this option to specify whether or not to include the item in the eBay Gallery. The Gallery is simply another way to promote your item within the auction. If you choose **Gallery** as an option for listing your auction, the first image (upper left on the Photo tab) will be designated as your gallery image.

   As with the Auction Features (above), the cost next to each option represents the fee you wish to charge the consignor's account, and not the amount eBay charges. To set these amounts, go to **Tools** → **Ecommerce Options** and select the **Marketplace** tab. See the section entitled Set Ecommerce Marketplace Options for more information.

10. **HTML Template**. Use the drop down menu to select the **HTML Template** to use for this item. If you have created customized templates and stored them in the C:\RWD\-AuctionTemplates directory, those templates will also be available in this drop-down menu. For more information about creating Auction Ads with HTML Templates, please see the section in the manual entitled Auction Ads and HTML Templates.

11. **Preview**. Click the **Preview Button** to view the Auction Ad for the item. The Auction Ad will show on screen in your browser as it will appear to online shoppers using the same browser.

12. When finished entering information on this display, click the **Save** button. At this point you may wish to proceed to one of the other tabs, wait until later to enter additional information, turn over the responsibility for entering the other required information to another person, click on the Item Info tab and begin adding another item, etc.

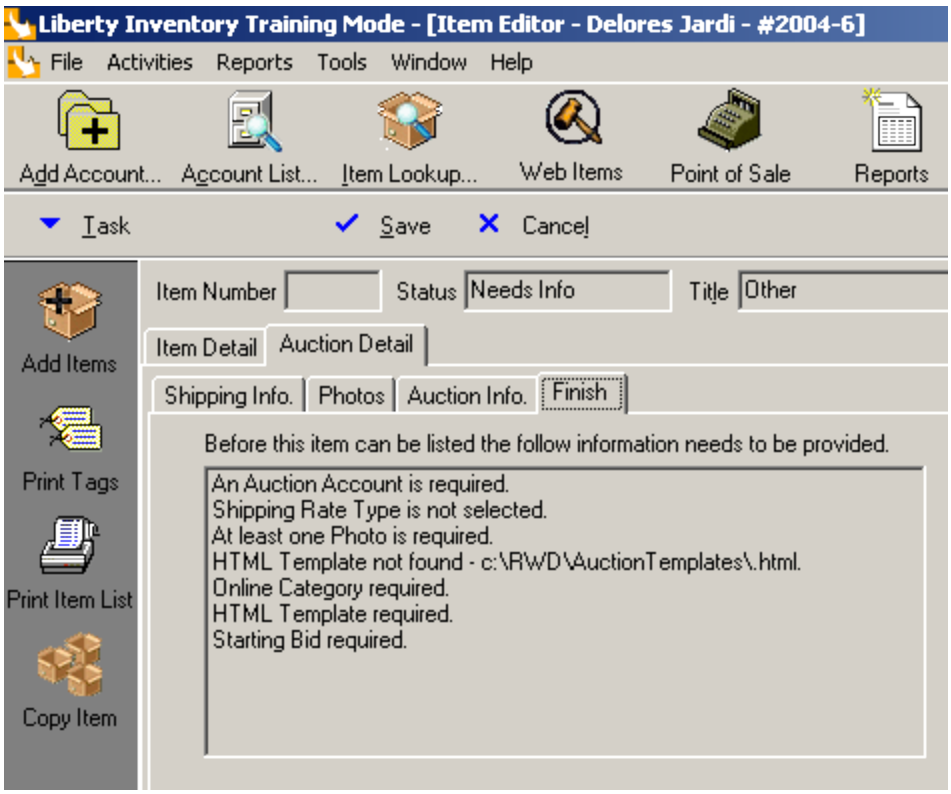
Related Topics

General Ecommerce Set Up

Finish Tab

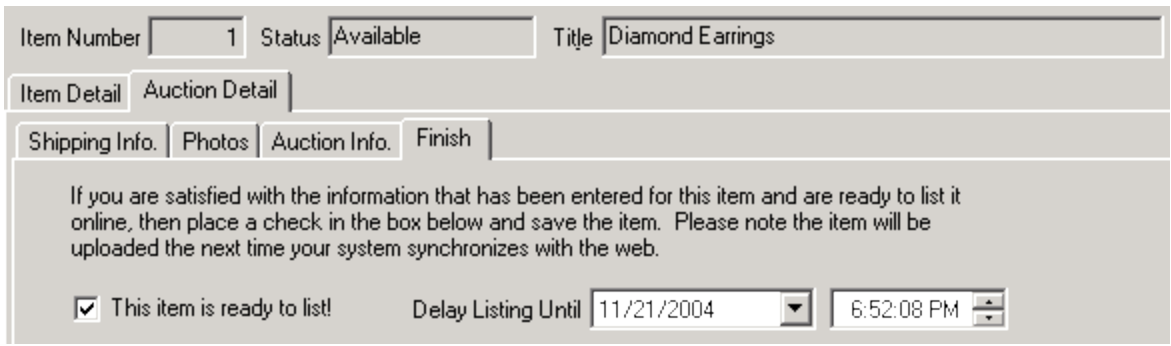
The **Finish Tab** serves two purposes:

1. It provides a summary of the auction, including a list of any required information that must still be supplied before the item can be put on auction by synchronizing with the broker and posting it online. Below is an example of an auction which still requires information:


Liberty Inventory Training Mode - [Item Editor - Delores Jardi - #2004-6]
File Activities Reports Tools Window Help
Add Account... Account List... Item Lookup... Web Items Point of Sale Reports
Task Save Cancel
Add Items
Print Tags
Print Item List
Copy Item
Item Number Status Needs Info Title Other
Item Detail Auction Detail
Shipping Info. Photos Auction Info. Finish
Before this item can be listed the follow information needs to be provided.
An Auction Account is required.
Shipping Rate Type is not selected.
At least one Photo is required.
HTML Template not found - c:\RWD\AuctionTemplates\.html.
Online Category required.
HTML Template required.
Starting Bid required.

It is important to understand that ALL necessary parameters must be entered before an auction can be listed. As long as there are still one or more required parameters to be entered, the item will have a Status of **Not Ready**. When all necessary information has been entered the item's status will change to **Available**.

2. When all required information has been entered and the item has a status of **Available**, the following information will be displayed in the Finish tab:


Item Number 1 Status Available Title Diamond Earrings
Item Detail Auction Detail
Shipping Info. Photos Auction Info. Finish
If you are satisfied with the information that has been entered for this item and are ready to list it online, then place a check in the box below and save the item. Please note the item will be uploaded the next time your system synchronizes with the web.
This item is ready to list! Delay Listing Until 11/21/2004 6:52:08 PM

It is necessary to put a check in the **This item is ready to list** checkbox in order for the item to be uploaded to the broker.

Copyright 2010, Resaleworld.com, Inc.

In the **Delay Listing Until (Date & Time)** fields, either leave the date and time as is, in which case the item will be uploaded with the next Synchronization, or change them so as to launch the auction later.

When you have finished specifying all required information, click the **Save** button. This will save the data (as you have entered it) into the Account database and automatically add the item into the Liberty. You are now ready to enter an additional item.

AUCTION ADS AND HTML TEMPLATES

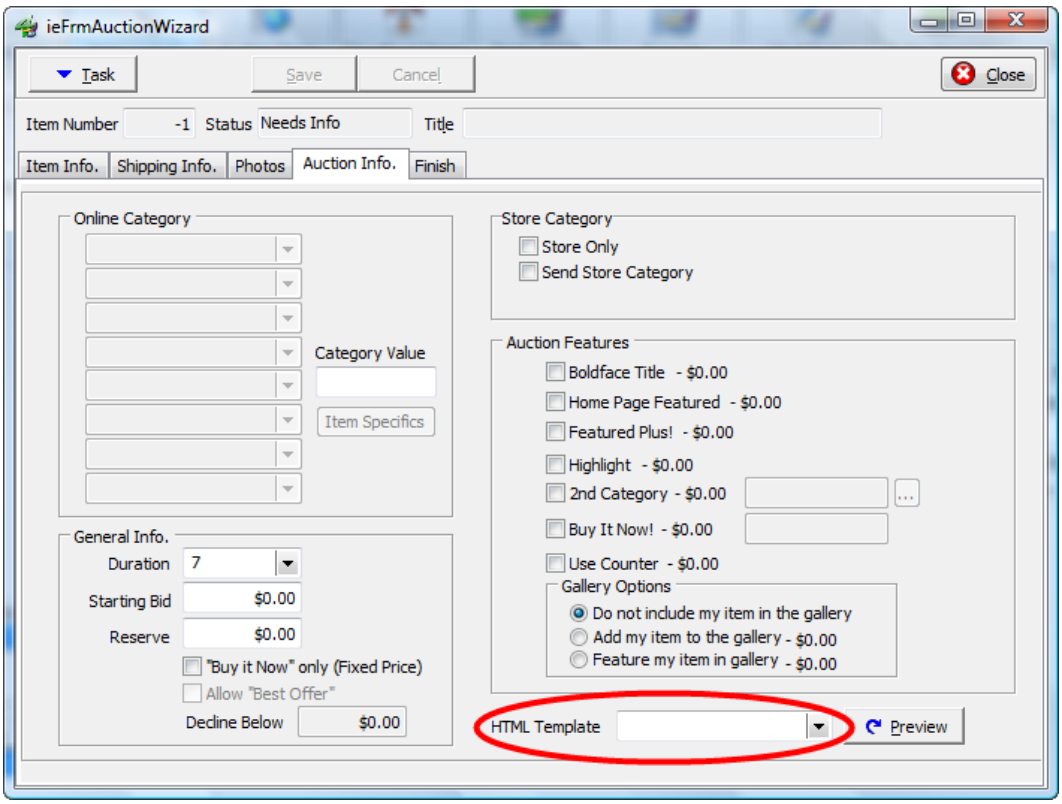
HTML Templates (also known as **Auction Templates**) are used to present information contained in Liberty in online auction ads. Using templates greatly simplifies the process of creating individual ads for items listed online, because the templates use HTML to present information contained in Liberty in the auction ad. Think of HTML Templates as the tool for creating colorful online advertisements to capture the attention of potential buyers.

Another benefit to using templates is they provide a method to project a consistent image of your business and the products it sells online. Since HTML Templates are fully customizable by anyone with a working knowledge of HTML (**H**yper**T**ext **M**arkup **L**anguage), it is possible to present project a highly professional image and brand identity using Templates designed specifically for your business. Doing so helps set your company and its products apart from other individuals and companies, which can lead to increased sales and profits.

If you would like to customize your HTML Templates, but are not familiar with coding in HTML, Resaleworld provides customization services upon request for a fee. Please contact Resaleworld for more information.

Liberty contains a number of different HTML Templates from which to choose for advertising your auctions. These templates are stored in the **C:\RWD\AuctionTemplates** folder. The program reads directly from this folder each time you are asked for a template to use. All templates stored in this folder will appear in the HTML Template's drop-down menu, which is located on the Auction Info. tab in the Item Entry routine:

Copyright 2010, Resaleworld.com, Inc.



Following is an example of a portion of an Auction Template in its native format, showing the HTML codes that are used to pull information from Liberty into the Auction Ad:

As you can see when viewing the HTML Template shown above, a number of HTML codes are used to present item information to consumers. These HTML codes are referred to as **Auction Ad Macros**. A complete list of available Auction Ad Macros is provided in the section entitled HTML Macros.

When the Auction Ad appears online, below the content provided by the HTML Template appears auction payment and shipping information. Liberty integrates with eBay to provide this information online based on information entered elsewhere in Liberty. For instance, shipping and payment information are set up under **Tools** → **Ecommerce Options** on the Shipping, eBay Settings, and Policies tabs respectively. It is not necessary, however, to include this information in the Auction Template as the eBay integration already performs the task for you: doing so would cause redundant information to appear in the Auction Ad.

Copyright 2010, Resaleworld.com, Inc.

To recap our terminology, the **Auction Ad** is the entire ad. The **HTML Template** is a part of the Auction Ad, but not the entire ad, as payment information and policies are added to the Auction Ad automatically in the background through the Liberty/eBay integration. On occasion the term **Listing** is substituted for **Auction Ad**, and **Auction Template** is sometimes substituted for the term **HTML Template**.

You are not restricted to using just the templates provided. Liberty allows you to customize existing templates and/or create new templates. You can use any HTML editor to create or modify your templates.

Important Note: Some editors, including Microsoft FrontPage and Adobe Dreamweaver, automatically change the underlying HTML code to suit their own preferences. This often results in information not displaying properly on screen when viewed in a browser.

A thorough knowledge of HTML programming is necessary to debug the problems created by using these products. If you are not well versed in HTML coding you may contract with Resaleworld to custom design pages for you.

If you decide to customize your Auction Template, to start off quickly we recommend taking one of the existing templates and copying it to another file and renaming it to whatever file name you desire. It is necessary to end the file name with the extension **.HTML** so that Liberty can identify the various templates in your system. Work with this file until you are satisfied with the end product.

Related Topics

HTML Macros

Set Up Ecommerce Policies

Set Up eBay Settings

Set Up Ecommerce Shipping Options

HTML MACROS

A variety of Macros are available to allow various information in Liberty to be displayed in the Auction Ads.

Copyright 2010, Resaleworld.com, Inc.

Note: *It is necessary to use these macros* ***exactly*** *as formatted in order that the information is successfully merged.*

Following is a list of available macros:

HTML Macro	Description
<#Field ItemNumber/	The item's Item Number, as assigned by Liberty (from the Item Entry screen)
<#Field Title/>	Title of the item (from the Item Entry screen)
<#Field SubTitle/	Sub-title of the item (from the Item Entry screen)
<#Field Description/>	Description of the item (from the Item Entry screen)
<#Field Brand/>	From the Item Entry screen
<#Field Category/>	From the Item Entry screen
<#ATTRIBUTES> <LI> <font face="Verdana"> <b><#Field AttrName/ = font color="#	Attribute List and Values of the item (from the Item Entry screen)
<#Field RetailPrice/	From the Item Entry screen
<#Field BuyItNowPrice/	From the Item Entry screen
<#Field StoreSection/	From the Item Entry screen
<#Field Location/>	From the Item Entry screen
<#Field Quantity/>	From the Item Entry screen
<#Field ItemID/	Internal product number generated by Liberty (this field is different than the Item Number field referred to above)
<#Field PaymentInfo/	Information contained in Tools → Ecommerce Options → Policies Tab → Payment Policy field.
<#Field ReturnInfo/	Information contained in Tools → Ecommerce Options → Policies Tab → Return Policy field
<#Field ShippingInfo/>	Information contained in Tools → Ecommerce Options → Policies Tab → Shipping Policy field
<#Field HeaderHTML/>	Information contained in Tools → Ecommerce Options → Policies Tab → Header HTML field
<#Field FooterHTML/>	Information contained in Tools → Ecommerce Options → Policies Tab → Footer HTML field
<#Field Weight/>	Weight of the item (located in Item Entry under the Auction Detail tab, on the Shipping Info. tab)

Copyright 2010, Resaleworld.com, Inc.

<#Field Length/>	Length of the item (located in Item Entry under the Auction Detail tab, on the Shipping Info. tab)
<#Field Width/>	Width of the item (located in Item Entry under the Auction Detail tab, on the Shipping Info. tab)
<#Field Height/>	Height of the item (located in Item Entry under the Auction Detail tab, on the Shipping Info. tab)
<#Field ShippingCost/>	Flat Fee Shipping Cost or Handling Cost in the case of Calculate Shipping (located in Item Entry under the Auction Detail tab, on the Shipping Info. tab)
<#Field InsuranceCost/>	Insurance Cost (located in Item Entry under the Auction Detail tab, on the Shipping Info. tab)
<#IMAGES> <#Field Image/> <#/IMAGES>	Array of all images associated with item
<#Field ImageURL1/>…<#Field ImageURL20/>	Individual tag associated with each image for each item.
<#Field StoreName/>	The name of the store, as displayed in Help → Enter Serial Number
<#Field StoreEmail/>	Store email address from Tools → Store Information dialog
<#Field StorePhone/	Store Phone Number from Tools → Store Information dialog
<#Field StoreWebSite/>	
<#Field StoreLogo/>	
<#Field StoreInfo/>	
<#Field Image1/>	
<#Field Image2/>	
<#Field Image3/>	
<#Field Image4/>	
<#Field Image5/>	
<#Field Image6/>	
<#Field CustomURL1/>	
<#Field CustomURL2/>	
<#Field CustomURL3/>	
<#Field CustomURL4/>	
<#Field CustomURL5/>	
<#Field CustomURL6/>	

Copyright 2010, Resaleworld.com, Inc.

There are also a few additional macros that can be used depending on which broker you are using to launch your items.

Macro	Description
%%ShipRateCalc%% (Auctionworks)	Displays shipping rate calculator button
%%GalleryLinkBanner%% (Auctionworks)	Displays Gallery button
%%InstantClickOut%%	Displays Instant Click-out Button

CHANGING ITEM INFORMATION

Inventory Module ➔ *2. Inventory Tab*

Use this procedure to make changes to an item in Liberty. In order to maintain data integrity, changes may only be made to items with a status of **Available**.

To Edit an Item

1. From the main menu, click on the **Accounts** button.
2. Double-click on the client's account that has the item that needs to be changed.
3. Click on the **Inventory** tab.
4. Double-click the item to be edited, **or**

   right-click on the item to be edited and select **Edit This Item**.

   The **Item Entry** window will display, with the selected item displayed.
5. Make the necessary changes.

Copyright 2010, Resaleworld.com, Inc.

6. Select the **Save** button when finished.
7. Select **Close** to exit the Item Entry window.

Related Topics

Add One of a Kind Items

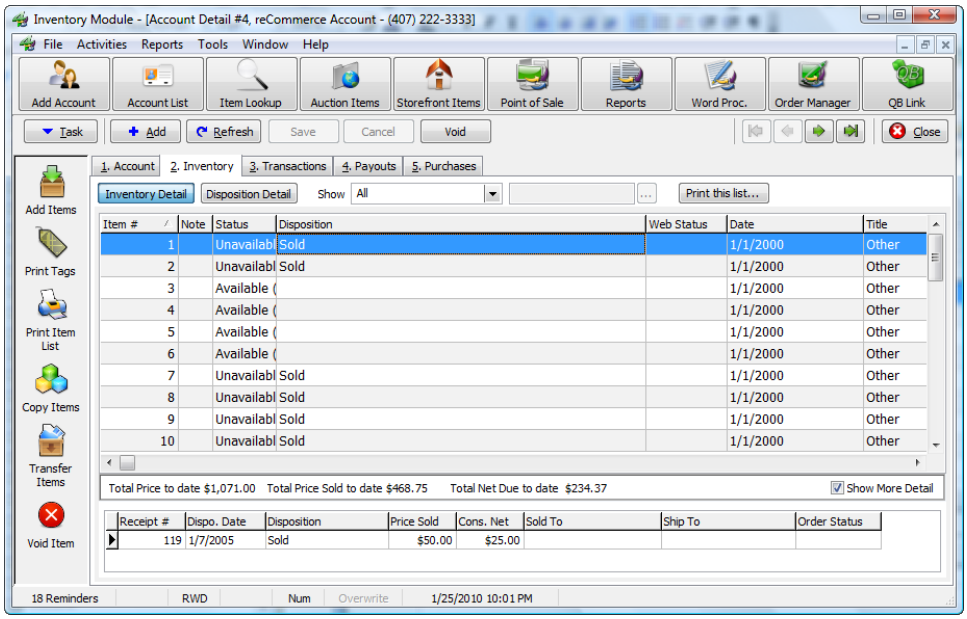
View Inventory

VIEWING ITEMS

To display (view) items after they have been added into an account, it is necessary to be in the Inventory screen.

View All Items in an Account:

1. From the Inventory Module, click on the **Accounts** button.
2. Double-click on the account you want to view.
3. Click on the **2. Inventory** tab. Below is a sample inventory screen:



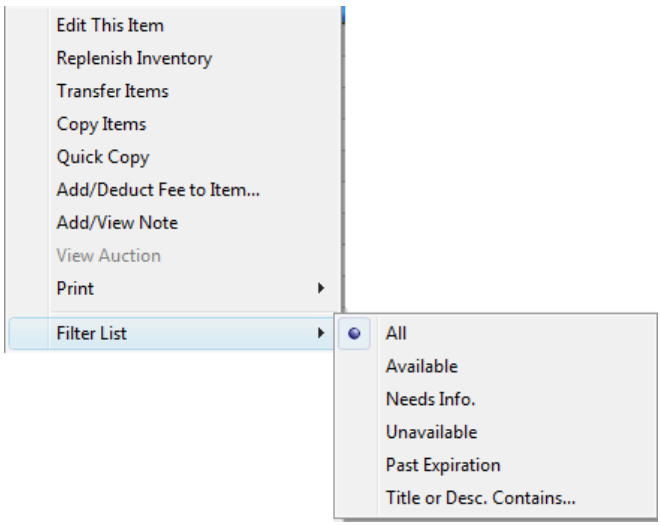
Note that in addition to the fields shown, additional fields may be viewed by moving the scroll bar at the bottom of the screen to the right. Fields not shown but available by scrolling to the right include the Payout, Item Fee, Cost/Net, Quantity, and Retail Price fields. You can see these fields in the next figure below.

Tip: Fields may be reordered by right clicking on the column header and dragging the field left or right to a preferred position.

Filtering the list allows you to view items based on their **status**. (Available, Sold and Not Paid, etc.) An example of how this is useful is you may view all Items which have sold but for which a consignor still needs to be paid. In this case you would select the **Sold and Not Paid** filter, which, once chosen, will cause only those items which have sold but for which the consignor has yet to be paid to appear on screen.

To View Just Items with a Particular Status:

1. Right-click on any item listed in the Inventory screen. A menu will display.
2. Move the mouse cursor over the **Filter List** menu option. A sub-menu will display as shown below:



3. Select a **Filter** option from the sub-menu. When a selection is made, the list of items will be filtered to meet your criteria.

Related Topics

View Inventory

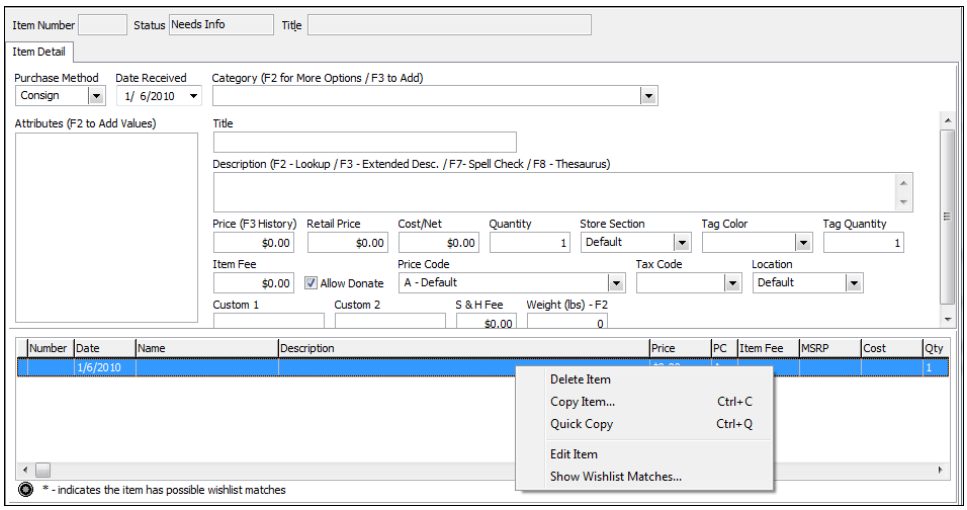
DELETING ITEMS

Inventory Module → Item Entry Screen

To maintain data integrity, an item may only be deleted so long as it still appears at the bottom of the Item Entry display. Once an item has been added and the Item Entry screen is closed the item cannot be deleted: at this point it may only be voided (see below for instructions on voiding an item).

To Delete an Item From an Account

1. While still in the Item Entry screen (before clicking on the **Close** button to leave the screen), look for the item to be deleted in the Item Entry Grid. The Item Entry Grid is located at the bottom of the Item Entry Window.



2. Right-click in the grid on the item to be deleted.
3. Select **Delete Item** from the menu that displays.

Following are three techniques for handling items you wish to remove from an account but are unable to delete using the steps above.

1. Replace all the information for the item to be deleted - description, price, title, etc. - with another item.
2. Create a junk account and transfer items into it. Be sure to assign the account a very high

account number, such as 999990, so that items in this account may be easily excluded from reports by filtering the account number range to (for example) 000001 - 999989.

3. **Void** the Item. Note that only items with a status of **Available** may be voided.

To Void an Item

1. Display inventory by clicking on the **2. Inventory** tab.
2. Select the item to be voided.
3. Click on the **Void Item** button on the left side of the screen.
4. Answer **Yes** to the message in the Confirm dialog.

Related Topics

View Inventory

Using *Auction Items* to Manage the Online Sales Process

Most of the work of handling items once they have been added to inventory (but before uploading to the auction web site) is performed in the **Web Items Maintenance** window (shown below). Note that for an item to appear in this window a **Marketplace** must be assigned. Also note that the Order Manager is used to manage items once they have been uploaded to the auction web site. Think of **Auction Items** and **Order Manager's** purposes as handling pre-upload and post-upload tasks respectively.

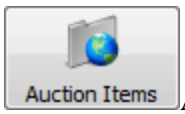
Uses for this window include:

1. Reviewing Auction Items,
2. Editing Auction Items,
3. Performing synchronizations,

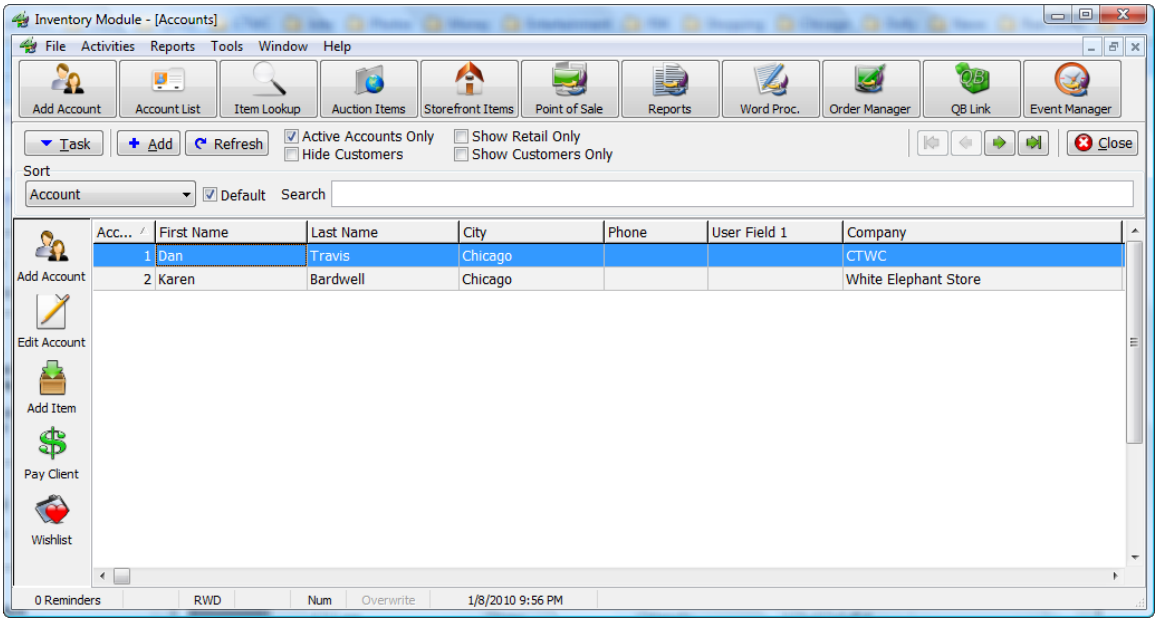
Copyright 2010, Resaleworld.com, Inc.

4. Re-Listing Auction Items, and
5. Managing the online link with the broker.

To Access the Auction Items Maintenance Window:

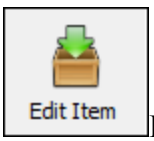
Click the 

Auction Items button at the top of the Inventory Module screen. This will open the **Web Items Maintenance** window:



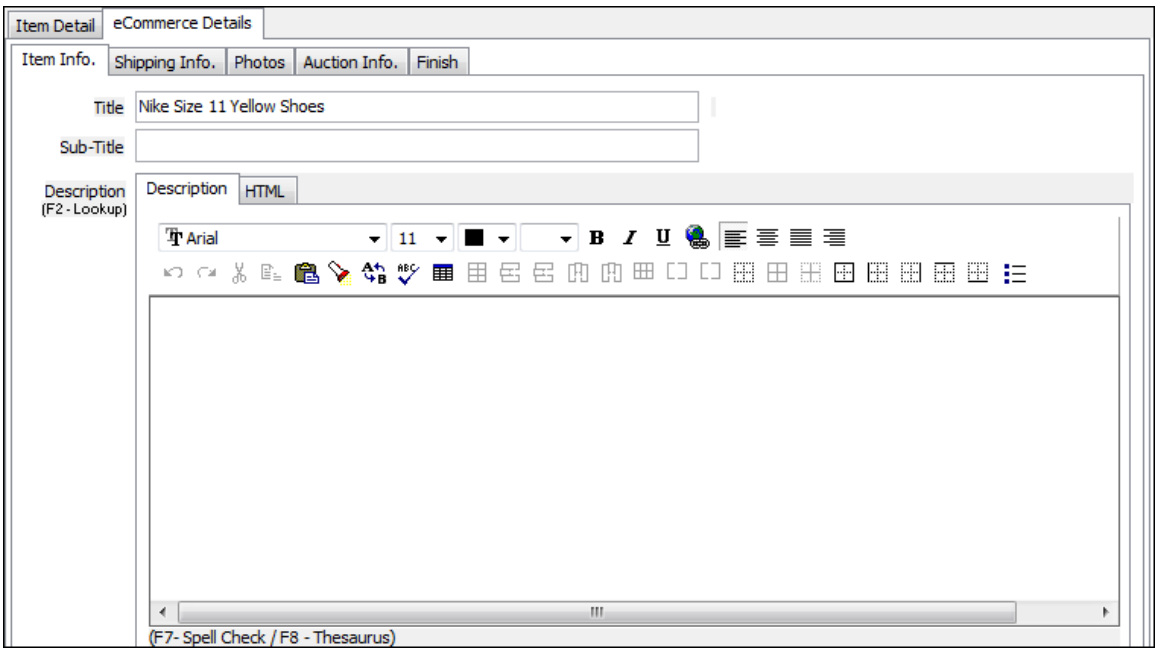
This window displays information pertaining to each web item, including its status, auction start time, shipping information, number of images, auction ID, etc. It also includes error messages to communicate problems such as those that may occur during the synchronization process.

The following routines are available by clicking on the icons in the Item Info tab along the left side of the **Auction Items Maintenance** window:



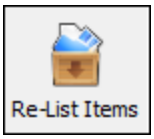
Edit Item. Upon selecting this icon (or double-clicking on the item in the list), the item will appear in the Item Editor window. This window provides access to all auction information including the extended description, shipping options, photos, auction parameters, and item detail.

Copyright 2010, Resaleworld.com, Inc.



Note that this window is very similar to the Item Entry window found under the **2. Inventory** tab. Rather than detail the workings of this window again here, refer to the section entitled Add One of a Kind Items for more details.

The primary difference between the Auction Items Editor (shown above) and the Item Editor is that the Auction Items Editor defaults to the Auction Detail tab, and shows the extended description instead of the standard description. Most users will find the item entry window displayed here in Auction Items to be the more efficient method of managing items.



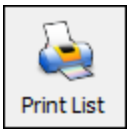
Re-List Items. Re-List items on new auctions if they did not sell. **Note:** this uses the existing auction settings for that item. You can only Re-List an item with ***Relist?*** in the status column. Please see the section entitled Re-Listing an Auction for more information on Re-Listing items for auction.

Refresh. Refreshes the list of items. It also updates orders after they have been downloaded.

Synchronize. Synchronize items to sell with the configured online auction and broker. This feature is also used to download orders, download new categories and item

specifics. Please see the section entitled Synchronizing with the Auction Website for more details about synchronizing.

View Log. Displays a log listing information uploaded and downloaded between Liberty and the auction site via the Broker and Image Host. For more information, see the section entitled The Synchronization Log File.

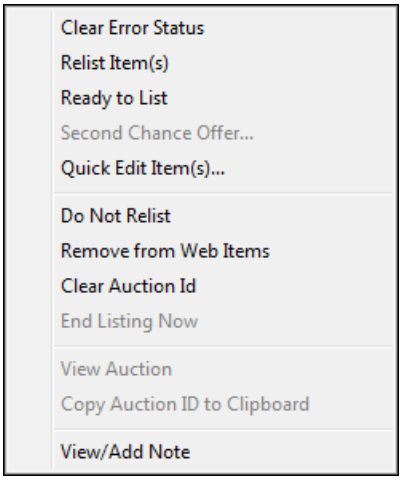


Print List. Prints an Auction Status List of the items for the currently displayed tab.

Information in this window can be sorted by clicking on the column header. Clicking on the column header toggles between ascending and descending order for the information contained in that column.

Additional Options

Right-clicking anywhere on the Auction Items grid to display the following menu:



Following is a description of the menu choices available in the above dialog:

- **Clear Error Status**. Deletes the contents of the Error Message field for the highlighted item.
- **Re-List Item(s)**. Same as described above. See the section entitled Re-Listing an Auction for more information on Re-Listing items.
- **Ready to List**. Changes the status of an item from **Not Ready** to **Ready**.
- **Second Change Offer**.
- **Quick Edit Item(s)**.
- **Do Not Re-List**. Remove the Re-List attribute for the item so that it will not be re-listed

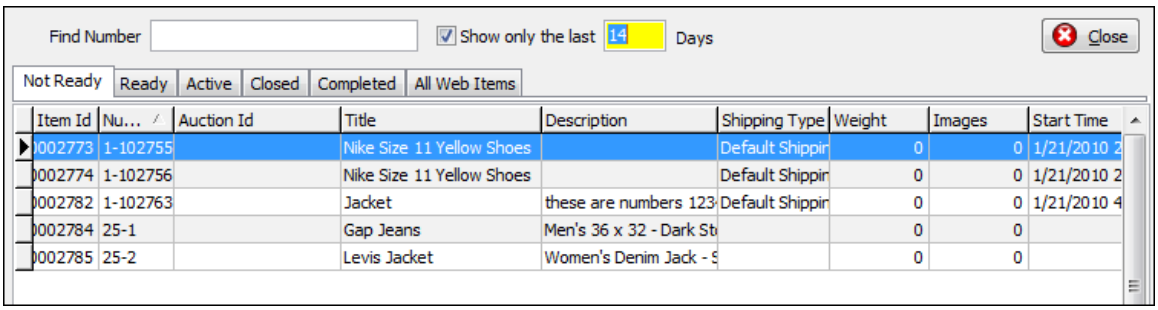
Copyright 2010, Resaleworld.com, Inc.

at auction.

- **Remove from Auction Items**. When an item is removed, the contents of the Marketplace field are erased. This in essence makes the item a non-auction item, as items cannot be sold at auction unless a Marketplace is assigned. To make the item available again for selling online, lookup the item in the consignor's inventory and assign a Marketplace in the Marketplace field.
- **Clear Auction ID**.
- **End Listing Now**.
- **View Auction**. Launches the online auction. Use this to view/review the item on the auction web site.
- **Copy Auction ID to Clipboard**. Since the Auction ID is rather lengthy, use this convenient feature to copy the ID to the clipboard so that it may be pasted elsewhere.
- **View/Add Note**.

Status Tabs

Note the **Status Tabs** contained in Auction Items:


Find Number
Show only the last 14 Days
Close
Not Ready
Ready
Active
Closed
Completed
All Web Items
Item Id
Nu...
Auction Id
Title
Description
Shipping Type
Weight
Images
Start Time
0002773 1-102755 Nike Size 11 Yellow Shoes Default Shippir 0 0 1/21/2010 2
0002774 1-102756 Nike Size 11 Yellow Shoes Default Shippir 0 0 1/21/2010 2
0002782 1-102763 Jacket these are numbers 123 Default Shippir 0 0 1/21/2010 4
0002784 25-1 Gap Jeans Men's 36 x 32 - Dark St 0 0
0002785 25-2 Levis Jacket Women's Denim Jack - S 0 0

Each **Status Tab** shows items with a particular status. In other words each **Status Tab** displays items at different stages of the inventory and sales process. Following is a description of the type of items displayed on each tab:

- **Not Ready.** An item still missing required information without which it cannot be transacted properly online).
- **Ready.** An item with all necessary information entered and has not yet been uploaded to an auction site).
- **Active.** An item which has been uploaded to the an auction site and which is currently still at auction).
- **Closed.** An item for which the auction has ended, which means the item may or may not

Copyright 2010, Resaleworld.com, Inc.

have sold).

- **Paid.** An item which sold and for which payment has been received).
- **All Auction Items.** All items listed online, whether Ready, Not Ready, Active, Closed, or Paid).

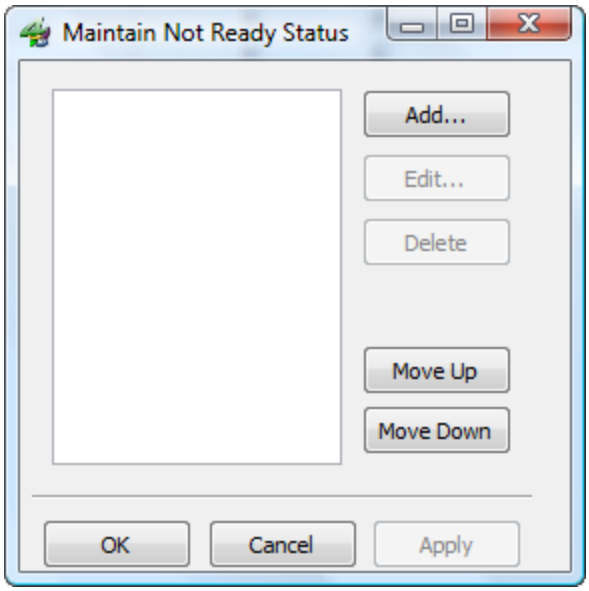
Not Ready Status Tabs

Some store operations benefit from having additional stages added to the process of handling items between the **Not Ready** and **Ready** Status. To aid in such situations, additional **Status Tabs** may be created for the purpose of tracking items prior to their becoming **Ready**. These tabs are known as **Not Ready Status Tabs**.

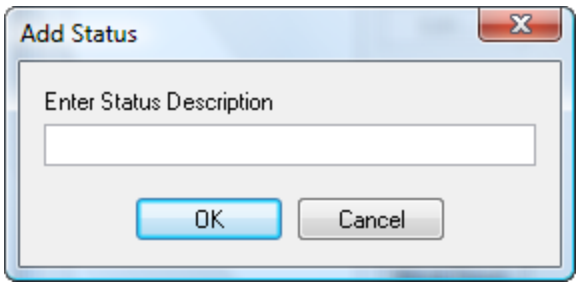
Following is an example of how adding additional **Not Ready Status Tabs** might be useful. The process for receiving items in a store might break down into entering the items' information at one station, followed by the taking of pictures at a separate station (location), followed by a final review prior to listing the item online. In such a case, creating two additional tabs, with one tab entitled *Pictures* Required and one tab entitled *For Review* might aid in tracking items throughout the process.

To Add Not Ready Status Tabs to the Auction Items Maintenance Window:

1. From the main menu of the Inventory Module, select **Tools** → **Maintain** → **Not Ready Status**. The **Maintain Not Ready Status** dialog will display:

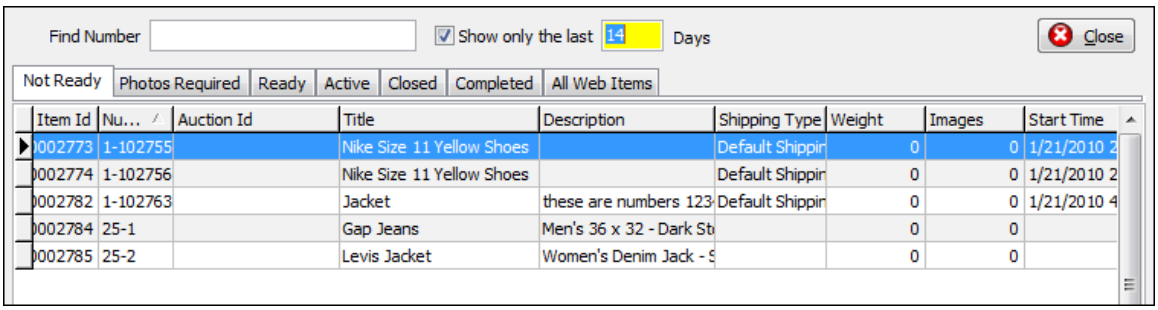


2. Select the **Add** button. The **Add Status** dialog will display.



3. Enter the name of the tab in the **Status Description** field, then select **OK**.
4. Select the **OK** button to close the Maintain Not Ready Status dialog. The tab will now appear between the **Not Ready** and **Ready** tabs in the Auction Items Maintenance screen.

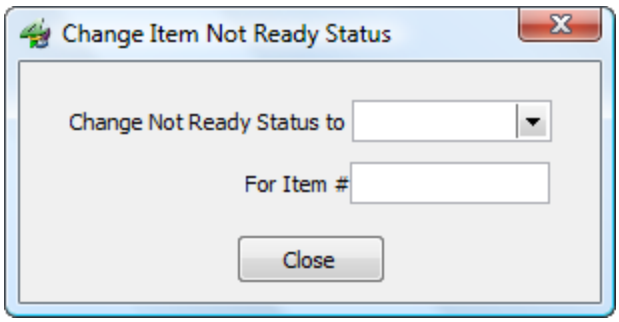
Note: *The tabs created are designed to fit only between the* ***Not Ready*** *tab and the* ***Ready*** *tab. The picture below shows how the tabs would be added based on the example given above:*


Find Number
Show only the last 14 Days
Close
Not Ready
Photos Required
Ready
Active
Closed
Completed
All Web Items
Item Id
Nu...
Auction Id
Title
Description
Shipping Type
Weight
Images
Start Time
0002773 1-102755 Nike Size 11 Yellow Shoes Default Shippir 0 0 1/21/2010 2
0002774 1-102756 Nike Size 11 Yellow Shoes Default Shippir 0 0 1/21/2010 2
0002782 1-102763 Jacket these are numbers 123 Default Shippir 0 0 1/21/2010 4
0002784 25-1 Gap Jeans Men's 36 x 32 - Dark St 0 0
0002785 25-2 Levis Jacket Women's Denim Jack - S 0 0

Once the **Not Ready Status Tabs** have been created, it will be necessary to move items from one tab to another.

To Move Items from one Not Ready Status Tab to Another:

1. From the main menu select **Activities** → **Change Item Not Ready Status**. The **Change Item Not Ready Status** dialog will display:



2. Select the new **Status** from the Change Not Ready Status to drop-down.

3. Enter the item number. The format is *account number-item number*. For instance, 25-1.
4. Select the **Close** button.

Related Topics

A Useful Tip for Managing Auction Items

Add One of a Kind Items

Re-Listing an Auction

Synchronizing with the Auction Website

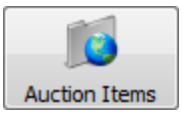
The Synchronization Log File

MANAGING AUCTION ITEMS

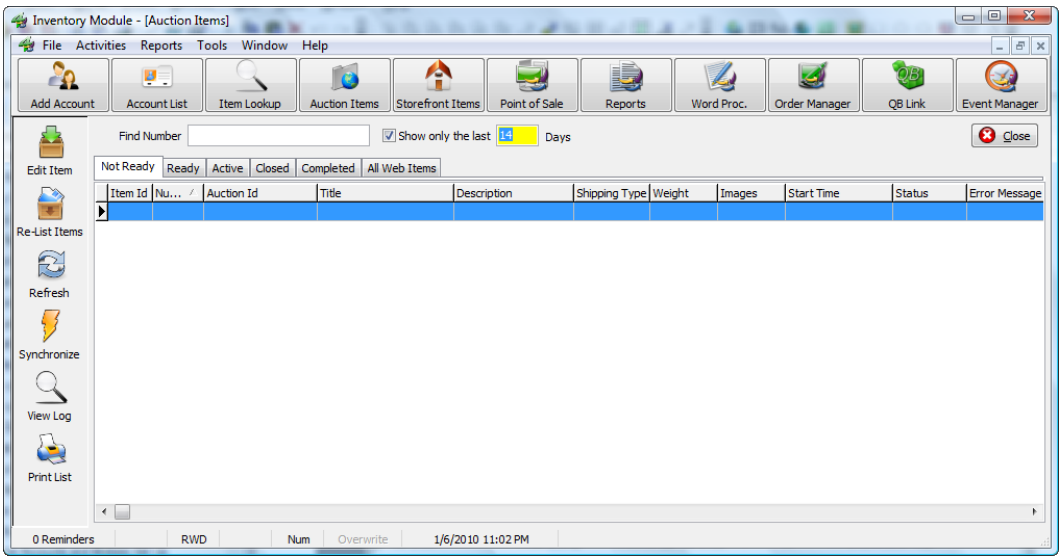
Inventory Module ➔ *Auction Items Button*

Once an item's basic information has been added, use Auction Items to handle items being listed for sale online. (After the item has been uploaded to the auction site, use the Order Manager to manage the item.)

Selecting the **Auction Items** button at the top of the screen…



…will open the Auction Items lookup screen:



As you can see, the layout of the Auction Items screens and location of their fields have been optimized for editing and managing Auction Items.

To Manage Items using the Auction Items Screen:

1. After starting the Auction Items screen, locate the item to be edited. The **Find Number** lookup at the top will assist in this effort when there are many items to look among. If you have difficulty finding the item, try the following:
    - There are five different Status tabs – Not Ready, Ready, Active, Closed, and Paid. Make sure the correct Status tab is selected.
    - Be sure the number of days listed in the **Show only the last __ Days** filter has a number entered that will allow the item to show. Changing the number of days or removing the check from the check box may be required.
2. Edit the item(s) as needed.
3. Click the **Save** button when finished.

Copyright 2010, Resaleworld.com, Inc.

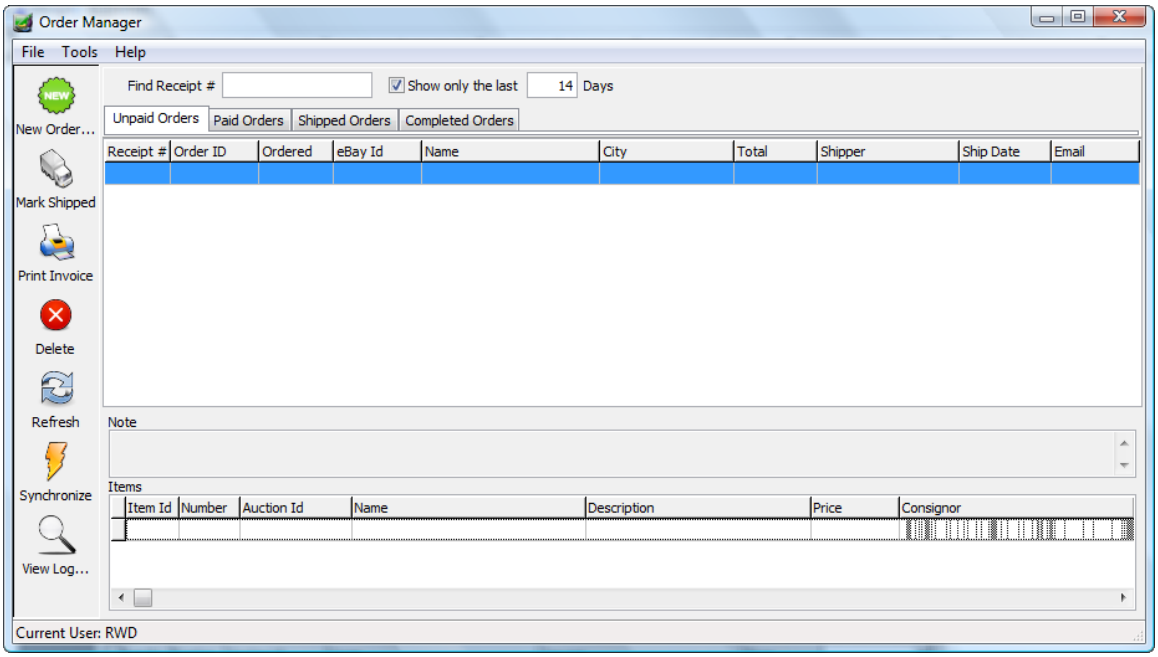
ORDER MANAGER OVERVIEW

Start → Programs → Liberty4 Consignment → Liberty Order Manager

Liberty handles the entire order process from beginning to end. The **Order Manager** is the central hub for all order related activities. It is used to:

1. Synchronize order, shipping and payment information with both eBay and the Broker,
2. Enter new orders manually,
3. Manage payments from online customers (if you have a physical storefront component to your business use Point of Sale for in store sales instead),
4. Print invoices,
5. Process order shipments,
6. Mark orders as closed,
7. Process refunds, and
8. Set order management preferences.

The **Order Manager** window provides you with full access to all the necessary order management processes:



In addition to the functions listed along the left side of the window, the Order Manager segregates the order process using four tabs. These tabs allow you to quickly glance at orders and their current status:

1. Unpaid Orders,
2. Paid Orders,
3. Shipped Orders, and
4. Closed Orders.

Additional Order Status tabs may be created to allow Liberty to be customized to suit the way your organization operates most efficiently. Please see the section entitled Order Status Preferences for more details.

> ***Note**: The Order Manager is used to manage items once they have been uploaded to the auction web site, whereas Auction Items is used to manage items during the inventory entry process. Think of **Auction Items** and **Order Manager's** purposes as handling pre-upload and post-upload tasks respectively.*

Following is a brief explanation of these four tabs.

Unpaid Orders Tab

After each **Synchronization** newly completed auctions and orders placed via your storefront are downloaded into Liberty. These newly sold items first appear on the **Unpaid Orders** tab, unless the buyer makes payment via PayPal, in which case the order will appear on the **Paid Orders** tab instead.

> ***Note:** The Synchronization process simultaneously launches new auctions and retrieves order information.*

All new, unpaid orders contain the following information:

- The selling price,
- The successful bidder's ID,
- The successful bidder's email address, and
- An order **record**. (If the auction is unsuccessful an order record is **not** created.)

Use the **Unpaid Orders** tab whenever the payment method is check, money order, credit card without using PayPal, etc. In these cases payment information is entered manually, as there is no way the Synchronization process would know this information if the buyer did not go through either eBay's or Marketworks' checkout process.

Copyright 2010, Resaleworld.com, Inc.

The **Unpaid Orders** tab is also used to change payment, buyer address, and other miscellaneous information. Details on handling Unpaid Orders are provided in section entitled Editing an Order.

Once you have entered the appropriate payment information and buyer address information, the order is moved to the **Paid Order** tab.

Paid Orders Tab

When full payment for an item has been received the order status changes from Unpaid to **Paid**. At this point the order moves to the **Paid Orders** tab.

If a buyer uses PayPal to pay for an auction, during Synchronization Liberty will detect the PayPal payment and immediately gives the order a status of **Paid**. In these cases the order skips the **Unpaid Orders** tab.

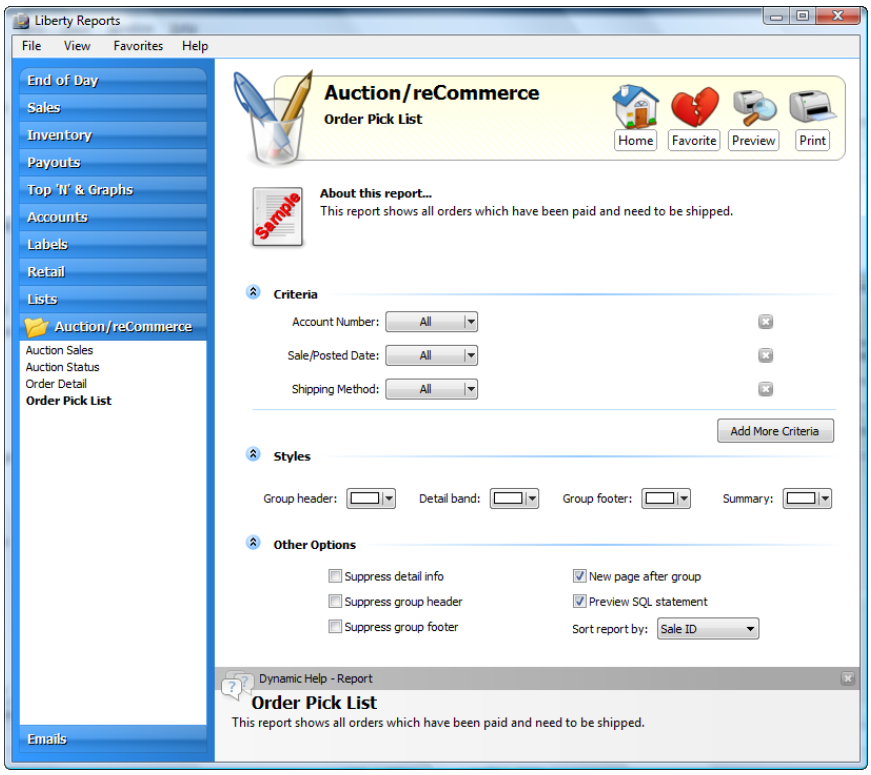
When payment for the order is not made via PayPal, order information is updated manually.

Once an order attains a status of **Paid** it is ready for shipping. At this point you can print a **Pick List**. The Pick List lists all Paid orders ready for shipment.

To Print a Pick List:

1. Start the **Liberty Reports** module by either:
    a. Clicking on the **Reports** button at the top of the screen, or
    b. Selecting **Reports** → **Reports** from the Main Menu.

    The Reports window will display:



2. Choose **Auctions/reCommerce** under the **Report Category** window.
3. Select **Order Pick List** in the **Report Name** window.
4. Select the appropriate parameters.
5. Print the Pick List by selecting either the Print Preview or Print button.

Once an item has been shipped, its status will change to Shipped by using the Mark Shipped routine. This process is described in greater detail in the section entitled Marking an Order as Shipped.

Shipped Orders Tab

This tab displays all shipped orders. Its purpose is to provide a quick, convenient place to review shipped orders. It is to this location that you will come in order to change an item's status from **Shipped** to **Closed**.

Closed Orders Tab

At some point after an order is shipped the status must be changed to **Closed**. Marking an order as Closed indicates that the order has been delivered and the buyer will not be returning the item. Once an item is given a status of Closed the consignor can be paid for the item.

Copyright 2010, Resaleworld.com, Inc.

> ***Note:*** *Consignors cannot be paid until an order is marked as Closed. Likewise, an order cannot be marked as Shipped or Closed unless it has been paid.*

Related Topics

A Useful Tip for Managing Auction Items

RE-LISTING AN AUCTION

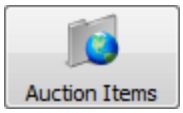
Inventory Module → Auction Items Button

Although online auctions are a great way to sell items, they aren't always successful. Online auctions are largely driven by the economy as a whole and market demand—i.e., the items that you sell may have a specific window (i.e., seasonal) or may be impacted as consumer spending goes down.

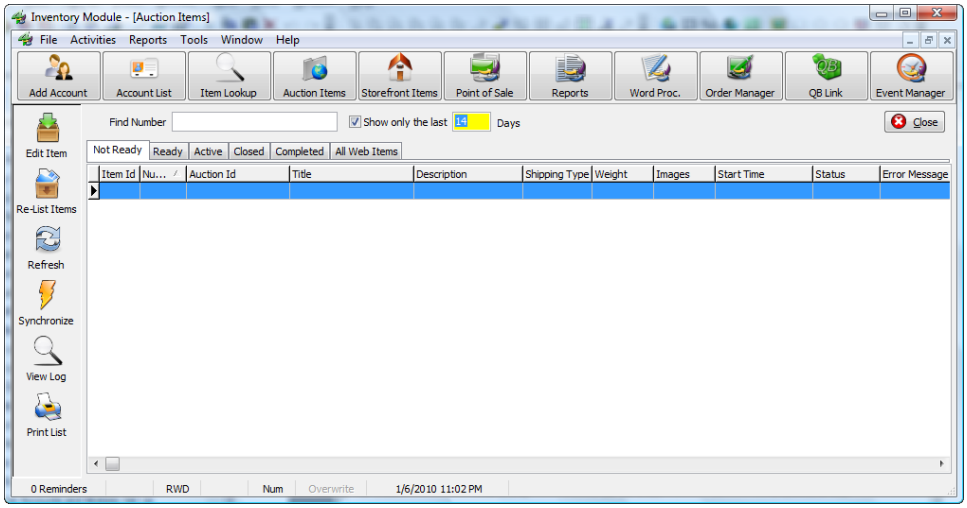
Whatever the case, when an auction isn't successful, Liberty provides you the ability to **Re-List** the item without reproducing all the work you did when you original posted the item.

To Re-list Items:

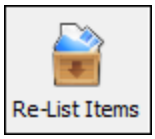
1. Select the Auction Items icon at the top of the screen (below).

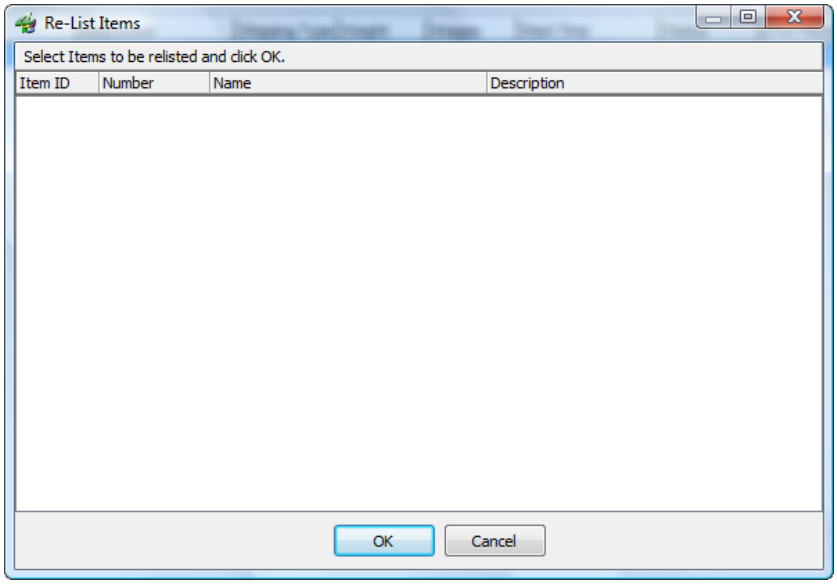
   The Auction Items dialog will display:



2. Click the Re-List Button from the Auction Items Tab (below).



This opens the **Re-List Items** window:



3. Select the items that you want to re-list from the list of items. When you are finished, click the **OK** button. This will automatically resubmit those items to your broker the next time that you synchronize.

> ***Note:*** *The Re-Listings will utilize all of the existing settings.*

EDITING AN ORDER

Start → Programs → Liberty4 Consignment → Liberty Order Manager

Overview

Various circumstances will require editing online orders. These include:

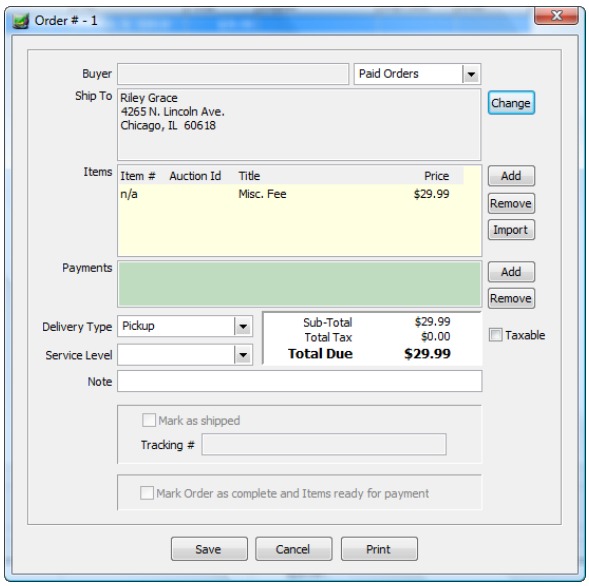
1. Orders with no payment information, for instance, whenever payment is not made via PayPal,
2. When existing payment details need to be changed,
3. Entering or changing the buyer's address,
4. Adding additional items and/or fees, and
5. Merging two or more purchases by the same buyer into one order.

Do not confuse editing an ***order*** with editing an ***item*** – they have two distinct goals, and thus separate processes.

To Edit an Order:

1. Start the **Order Manager**.
2. Double-click the item to be edited. The **Edit Order** dialog will display:

Copyright 2010, Resaleworld.com, Inc.



3. Make changes as necessary. When finished, click the **Save** button.

***Important Note**: Once an Order is edited in any way – Ship To information is changed, Payments are added, etc. – the Order will no longer poll eBay for online payments. In these circumstances payments must be manually added and controlled from the point where the order was edited forward.*

(The only setting on an Order that can be adjusted/edited, that will still allow the Order to poll eBay for payments, is the Order Status (e.g. Unpaid Order, Paid Order, a User-Defined status, etc.)

Related Topics

Edit an Item

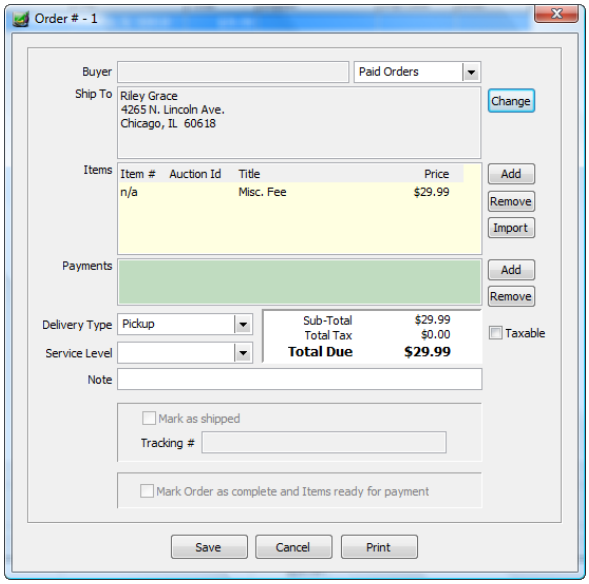
EDITING PAYMENT INFORMATION

Start → Programs → Liberty4 Consignment → Liberty Order Manager

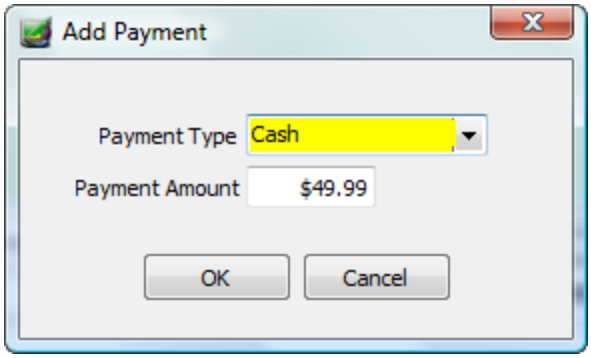
Copyright 2010, Resaleworld.com, Inc.

To Add a Payment to an Order:

1. Start the **Order Manager**.
2. Double-click the item to be edited. The **Edit Order** dialog will display:



3. In the **Edit Order** dialog, select the lowermost **Add** button (located to the right of the **Payments** panel). The **Add Payment** dialog will display:



4. Enter the method of payment by selecting from the **Payment Type** dialog.

> ***Note:*** *To add additional Payment Types, see the section entitled Set Up Payment Types elsewhere in this manual.*

5. Enter the amount in the **Payment Amount** field.
6. Select **OK**.

> ***Note:*** *Once full payment has been entered a* ***Green Check Mark*** ✔ *will appear next to the* ***Total Due****.*

To Change a Payment in an Order:

Note: *It is not possible to change an existing payment. Remove the payment, then re-enter the payment using the Add (payment) button.*

To Remove a Payment from an Order:

1. In the **Edit Order** dialog, click on the Payment to be removed.
2. Click the lowermost **Remove** button (located to the right of the **Payments** panel).

EDITING SHIPPING INFORMATION

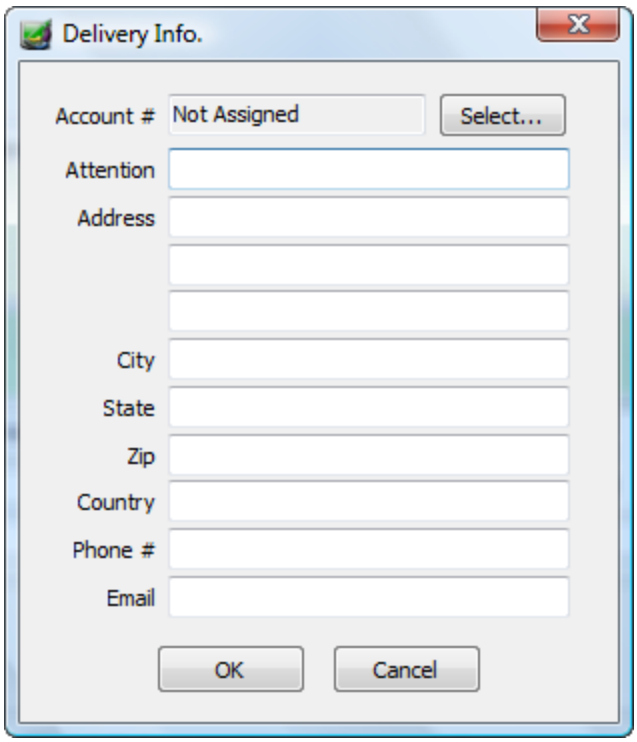
Start → Programs → Liberty4 Consignment → Liberty Order Manager

Sometimes it is necessary to change the **Ship To** address. Liberty allows you to only edit orders with a status of **Unpaid** or **Paid**. To maintain data integrity, orders with a status of **Shipped** or **Closed** cannot be edited.

To Add or Change the Buyer's Shipping Address:

1. In the **Edit Order** dialog, click on the **Change** button. The **Delivery Info** dialog will display.

Copyright 2010, Resaleworld.com, Inc.



2. Enter the necessary information.

   Using the **Select** button lets you lookup an existing account so you don't have to re-enter the delivery information. The search function will search the field currently used for the primary sort. To change the primary sort field, click on the column header of the field you wish to perform the search on.

   For example, to search by last name, click on the last name column header, then enter the buyer's last name in the **Find** field at the top of the dialog. When the desired account is highlighted select the **OK** button.

3. When finished click the **OK** button.

Note: *Buyer information must be entered into the* ***Ship To*** *area in order to print an invoice.*

PRINTING AN INVOICE

Start → Programs → Liberty4 Consignment → Liberty Order Manager

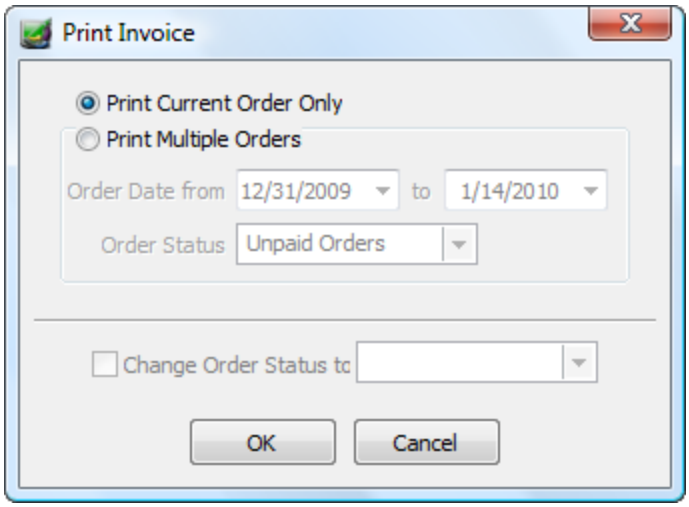
Printing an invoice helps ensure customer satisfaction by providing another method of communication with your customers. It also demonstrates the professionalism of your business and operations.

An additional benefit to printing invoices is the barcode that is printed on each invoice. This barcode represents the Order ID: scanning the barcode while using the Ship Multiple Orders routine improves efficiency. Please see the section entitled Shipping Multiple Orders for more details.

There are a number of options you can specify when printing invoices. Printing options are located in the **Order Manager's** main menu under **Tools** → **Options**. Please see the section entitled General Ecommerce Set Up for more information.

To Print an Invoice for a Single Order:

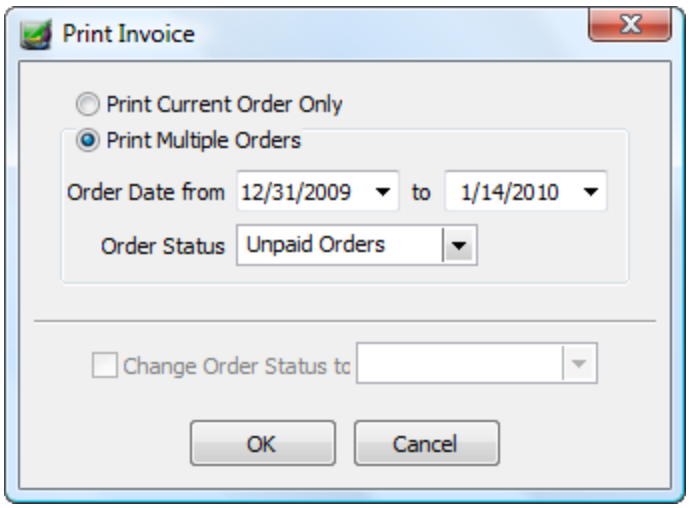
1. In the **Order Manager**, highlight the order for which an invoice is to be printed.
2. Click the **Print Invoice** button in the Taskbar. The **Print Invoice** dialog will display:



3. The **Print Current Order Only** radio button will already be selected, so click the **OK** button.

To Print Invoices for Multiple Orders:

1. In the **Order Manager**, click the **Print Invoice** button in the Taskbar. The **Print Invoice** dialog will display.



2. Select the Print Multiple Orders radio button. Doing so will activate the remaining fields in the dialog:
3. Enter the **Order Date** range. Note the date range defaulted to is based on the number of days displayed in the **Show Only In The Last Days** field at the top of the Order Manager.
4. Select the Status of the orders for which invoices are to be printed (Unpaid, Paid, Shipped, or Closed).
5. Optionally change the status of the order in the **Change Status of Order to** field. For example, you may want to change the status from Paid to Shipped, or Shipped to Closed.

   Another possibility is to create a status of (for instance) Pre-Packaged and change to this status. To create a new Status, do the following:

   a. From the **Order Manager** main menu, select **Tools** → **Maintain Order Status List**.

   b. Select the **Add** button.

   c. Enter the new **Status** in the dialog provided and click **OK**.

MARKING AN ORDER AS SHIPPED

Start → *Programs* → *Liberty4 Consignment* → *Liberty Order Manager*

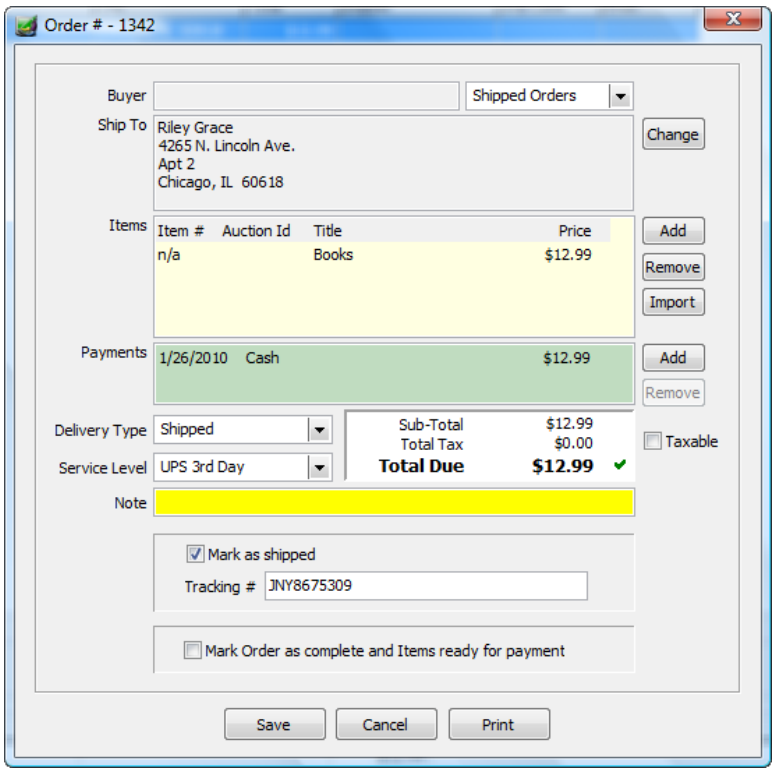
Copyright 2010, Resaleworld.com, Inc.

Once payment is received the order is generally shipped. At this point you may **Mark** the item(s) as having been shipped. This allows the shipping method and the tracking number to be entered. A confirmation email to the customer may also be generated.

There are two ways to mark an one item or order at a time as shipped – each is described below. For information on how to more quickly and efficiently mark a many items or orders as shipped, please see the following section entitled Shipping Multiple Orders.

To Mark an Order as Shipped – Method #1:

1. Start the **Order Manager**.
2. Select the **Paid Orders** tab.
3. Double-click the order to be marked as shipped. The **Order** dialog will display:



   Note that a green check mark appears next to the Total Due. This indicates the order is Balanced with payments equaling the same as the amount due. If the order is not balanced the **Mark as Shipped** check box will be deactivated: adjust the order as required to balance it.

4. Click on the **Mark as Shipped** check box to place a check in it.
5. Enter the shipping method in the **Delivery Type** field.
6. Enter the **Service Level**.

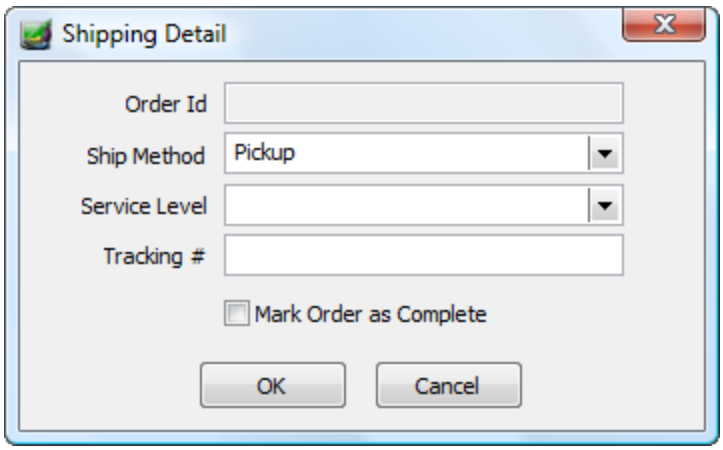
Copyright 2010, Resaleworld.com, Inc.

7. Enter the Tracking Number in the **Tracking #** field.
8. Check the **Mark Order as Complete and Items Ready for Payment** check box. Marking an order as **Complete** tells the system this order has been paid and shipped and will calculate all the necessary transactions in order to pay a consignor. If you do not mark an order as Complete, your consignor will not be paid for any of the items that have been sold on eBay.

Note: *Use the Pay Delay feature, located in Liberty under* ***Tools*** → ***Options*** → ***3 – Payouts*** *to delay payment to the consignor until sufficient time has elapsed from the date of the sale. Please see the section entitled* *Set Payment Defaults* *for more information.*

To Mark an Order as Shipped - Method #2:

1. Start the **Order Manager**.
2. Select the **Paid Orders** tab.
3. Highlight the order to be marked as shipped.
4. Click the **Mark Shipped** button in the Taskbar on the left side of the Order Manager window. The **Shipping Detail** dialog will display:



5. Select the **Shipping Method** from the drop-down list.
6. Enter the **Service Level**. The service method selected by the buyer should automatically be populated, however, you have the option to override it here.
7. Enter the Tracking Number in the **Tracking #** field.
8. Check the **Mark Order as Complete** check box. Marking an order as **Complete** tells the system this order has been paid and shipped and will calculate all the necessary trans-

Copyright 2010, Resaleworld.com, Inc.

actions in order to pay a consignor. If you do not mark an order as Complete, your consignor will not be paid for any of the items that have been sold on eBay.

Note: *Use the Pay Delay feature, located in Liberty under* ***Tools*** → ***Options*** → ***3 – Payouts*** *to delay payment to the consignor until sufficient time has elapsed from the date of the sale. Please see the Set Payment Defaults topic for more information.*

Related Topics

Shipping Multiple Orders

SHIPPING MULTIPLE ORDERS

Start → *Programs* → *Liberty4 Consignment* → *Liberty Order Manager*

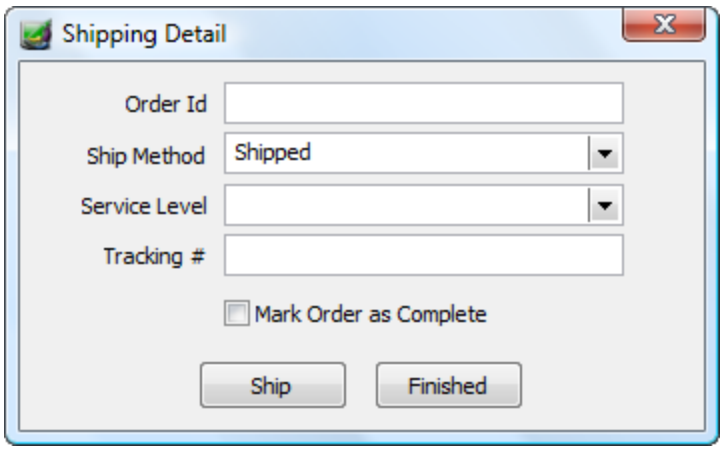
The most efficient method of marking orders as shipped is to use the **Ship Multiple Orders** routine. This routine allows you to scan both the barcode printed on the invoice and the barcode printed on the Shipping Label. Doing so speeds the information entry process.

If you are using UPS Worldship for shipping your packages, Liberty can integrate directly into Worldship to allow even faster, easier package processing. Please see the Appendix for more information about **UPS Worldship** integration.

To Ship Multiple Orders:

1. Start the Order Manager module.
2. From the **Main Menu** select **Files** → **Ship Multiple Orders**. The Ship Multiple Orders dialog will display:

Copyright 2010, Resaleworld.com, Inc.



3. Scan the **Order ID** barcode on the **Invoice** using a barcode reader. (See the section entitled Printing an Invoice for information on printing invoices.) Upon scanning the bar-code the **Shipping Method** and **Service Level** fields will be automatically filled in.
4. Scan the barcode from the UPS shipping label. This will populate the **Tracking #** field.
5. To send an Email Notification to the buyer, click on the **Send Email Notification** check box.
6. To complete the order, click on the **Mark Order as Complete** check box. Marking an order as **Complete** tells the system this order has been paid and shipped and will calculate all the necessary transactions in order to pay a consignor. If you do not mark an order as Complete, your consignor will not be paid for any of the items that have been sold on eBay.

> ***Note:*** *Use the Pay Delay feature, located in Liberty under* ***Tools*** → ***Options*** → ***3 – Payouts*** *to delay payment to the consignor until sufficient time has elapsed from the date of the sale. Please see the section entitled Set Payment Defaults for more information.*

7. To mark the order as shipped either:
    a. Click the **Ship** button, or
    b. Press the <**F10**> key on your keyboard.

After each order is marked as shipped the Ship Multiple Orders dialog will return to an empty state, ready for the next Invoice to be scanned to enter the Order ID. Note that the **Send Email Notification** and **Mark Order as Complete** options will carry forward to the next order.

Copyright 2010, Resaleworld.com, Inc.

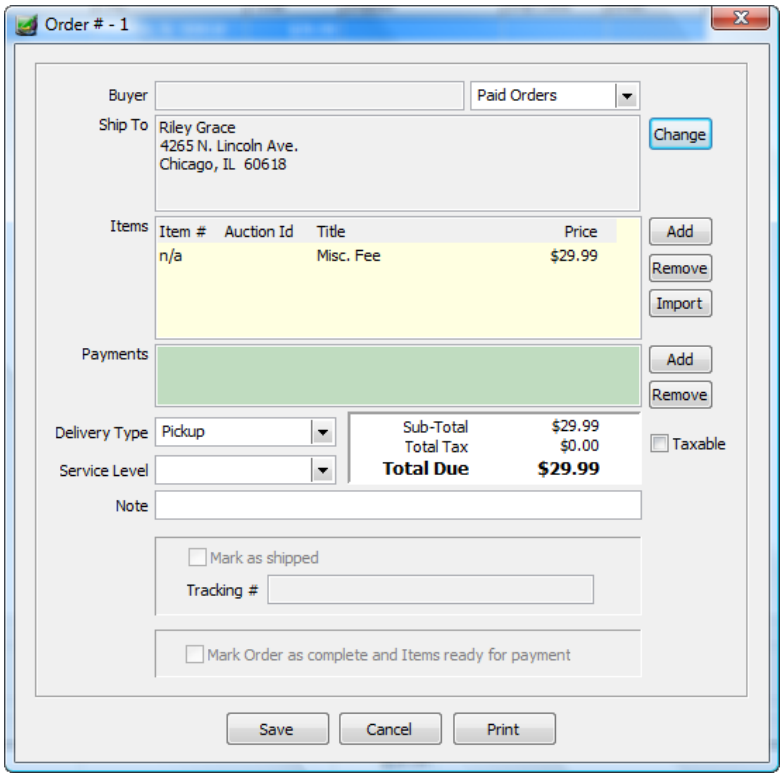
MERGING MULTIPLE ITEMS INTO ONE ORDER

Start → Programs → Liberty4 Consignment → Liberty Order Manager

When a buyer purchases multiple items from you and Liberty downloads those (multiple) orders from eBay, those orders will be created with different order numbers. To save time and effort, the items may be merged into one order. This eliminates the printing of multiple invoices, having to enter the same address information multiple times, and allows shipping charges to conveniently be adjusted.

To Merge Orders Together

1. Start the **Order Manager**.
2. Double-click one of the items to be merged. The **Order** dialog will display:



3. Click the **Import** button next to the item detail section on the Order Entry window. You will only see orders that were made from the same buyer.
4. Select each of the orders and click **OK**. The selected orders will be merged with the original order and all items will be transferred over.

CREATING A NEW ORDER (OFF LINE ORDER)

Start → Programs → Liberty4 Consignment → Liberty Order Manager

During the course of business it is sometimes necessary to create an order completely outside of the orders generated by eBay or your storefront. This might occur when a customer contacts you directly after an auction is completed, or when an order did not download properly.

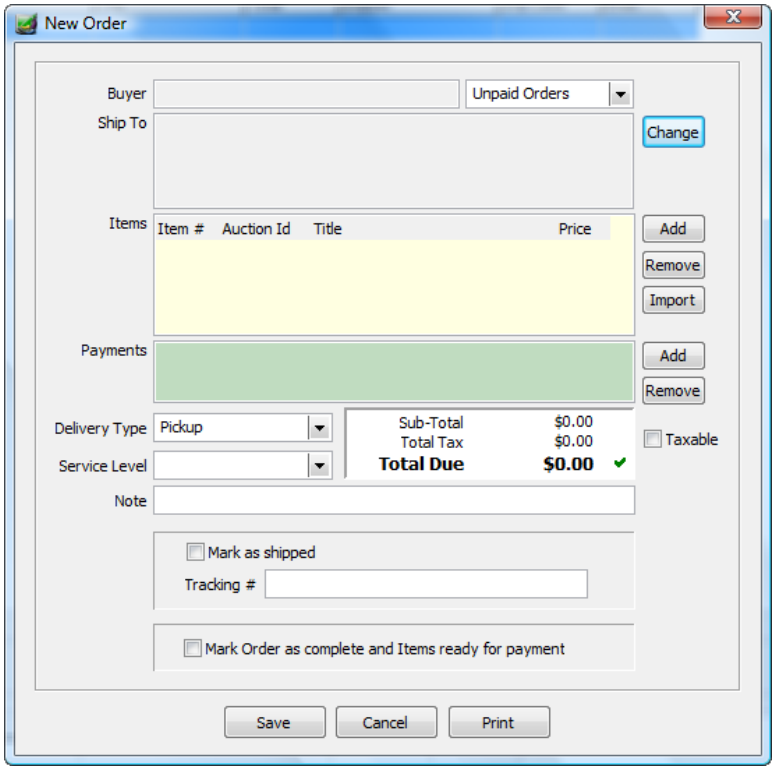
The **New Order** function allows you to mimic the information as though it were downloaded directly from the Broker. It allows you to enter the sale, customer information, payment, etc. In the process Liberty will treat the order just as though it was downloaded using the Synchronization process.

An important capability to remember about creating new orders is that you can sell inventory, add insurance and delivery amounts, credit amounts and so forth. You can sell anything that is inventoried in your system.

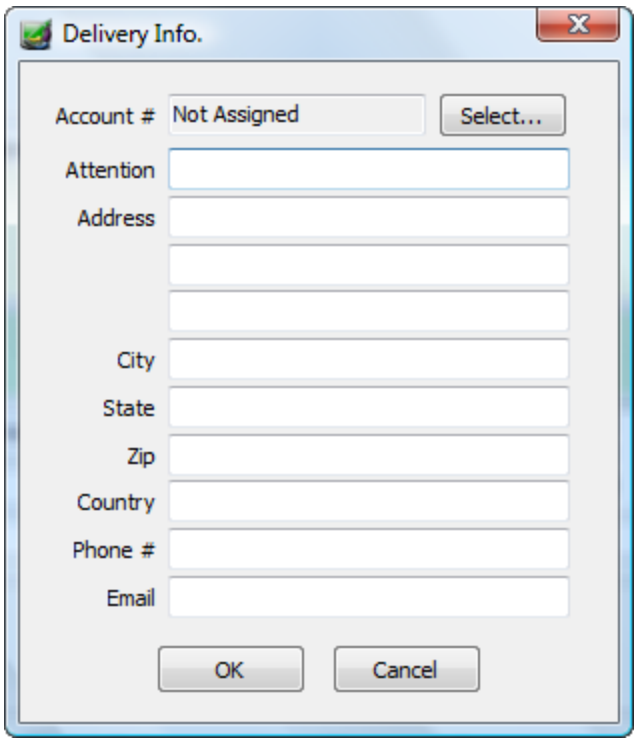
To Enter a New Order

1. Start the **Order Manage**r.
2. Create the order by either
    a. Clicking on the New Order icon in the Taskbar along the left side of the Order Manager window, or
    b. Select **File → New Order** from the **Main Menu**.

    The **New Order** dialog will display:



3. Enter the **Shipping Information** by clicking on the **Change** button. The **Delivery Info** dialog will display.



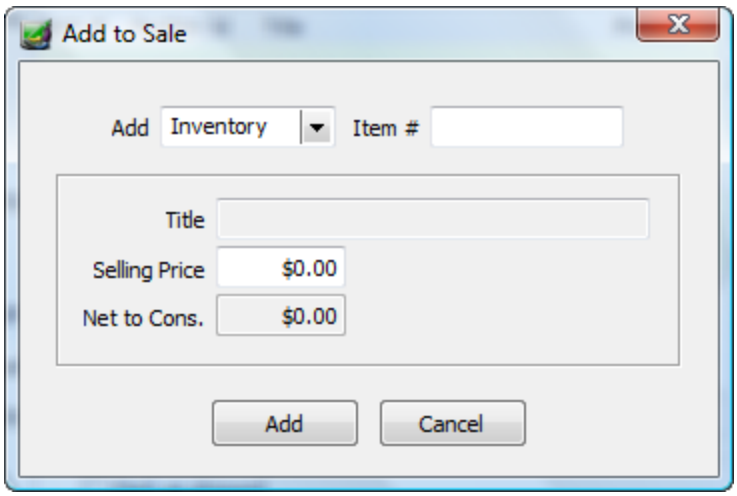
Enter the necessary information. Note that clicking the **Select** button lets you lookup an existing account so you don't have to re-enter the delivery information. The search function will search the field currently used for the primary sort. To change the primary sort field, click on the column header of the field you wish to perform the search on.

For example, to search by last name, click on the last name column header, then enter the buyer's last name in the **Find** field at the top of the dialog. When the desired account is highlighted select the **OK** button.

When finished click the **OK** button.

> ***Note:*** *Buyer information must be entered into the* ***Ship To*** *area in order to print an invoice.*

4. Enter the **Items** and **Fees** by using the topmost **Add** button (to the right of the Items panel). The **Add to Sale** dialog will display.



   a. Select the type of transaction from the **Add** drop-down (inventory, insurance, miscellaneous fee, etc.)

   b. If an item is being added to the sale, **Inventory** must be selected from the Add drop-down; then in the **Item #** field enter the Account Number, followed by a hyphen (-), followed by the Item Number. For example, (Account #) 123-1 (Item #).

   c. Enter the price in the **Selling Price** field.

   d. Enter the amount payable to the consignor, if appropriate, in the **Net to Cons**. field. Otherwise leave this field showing 0.00.

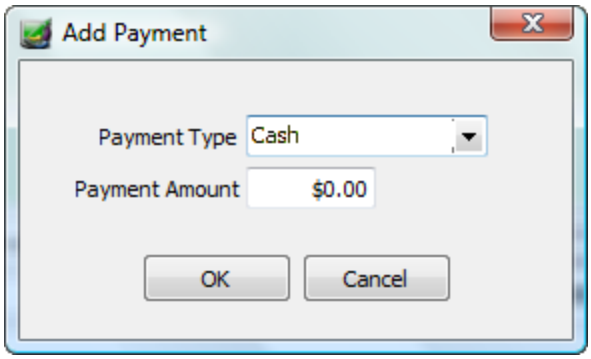
   e. Click the **Add** button when finished.

5. If the order is taxable, select the **Taxable** check box (so a check appears in the box).

6. Enter the payment by selecting the lowermost **Add** button (located to the right of the

Copyright 2010, Resaleworld.com, Inc.

Payments panel). The **Add Payment** dialog will display:



a. Enter the method of payment by selecting from the **Payment Type** dialog.

> ***Note:*** *To add additional Payment Types, see the section entitled Set Up Payment Types elsewhere in this manual.*

b. Enter the amount in the **Payment Amount** field.

c. Select **OK**.

> ***Note:*** *Once full payment has been entered a* ***Green Check Mark*** ✔ *will display next to the* ***Total Due****.*

7. Select the shipping method from the **Delivery Type** field.
8. Identify the **Service Level**.
9. Enter any notes in the **Note** field.

Refer to the Marking an Order as Shipped topic for information on marking the item as shipped.

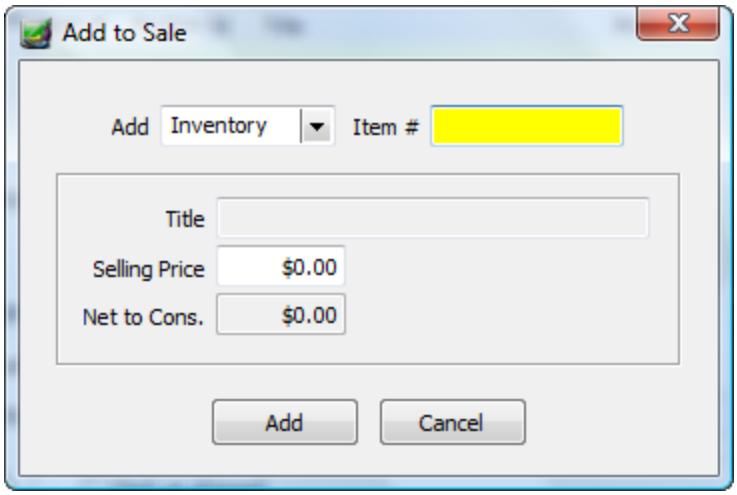
ADDING AN ITEM OR FEE TO A SALE

Start → Programs → Liberty4 Consignment → Liberty Order Manager

During the course of business it is sometimes necessary to add an item or fee to a sale. This might occur when a customer requests an additional service not included in the original sale, such as extra insurance, a special delivery method, etc.

To Add an Item or Fee To a Sale

1. In the **Edit Order** dialog, click on the **Add** button to the right of the Items panel (the top-most **Add** button). The **Add to Sale** dialog will display.



2. Select the type of transaction from the **Add** drop-down (inventory, insurance, miscellaneous fee, etc.)
3. If an item is being added to the sale, **Inventory** must be selected from the Add drop-down; then in the **Item #** field enter the Account Number, followed by a hyphen (-), followed by the Item Number. For example, (Account #) 123-1 (Item #).
4. Enter the price in the **Selling Price** field.
5. Enter the amount payable to the consignor, if appropriate, in the **Net to Cons**. field. Otherwise leave this field showing 0.00.
6. Click the **Add** button when finished.

Related Topics

Merging Multiple Items into One Order

Copyright 2010, Resaleworld.com, Inc.

SYNCHRONIZING TO UPLOAD ITEMS AND DOWNLOAD ORDERS

Start → Programs → Liberty4 Consignment → Liberty Order Manager

In order to launch items to and retrieve orders from eBay you must determine the **Broker** you will use and establish the connection with that Broker. This allows the **Synchronize** process to run, which manages all information moving between eBay and Liberty. You will not be able to launch items to eBay unless you have established a broker account and configured your broker settings.

Liberty provides users with direct integration with eBay via the eBay broker and also indirectly via the Marketworks broker. Broker settings are set up on the Marketplace & Accounts tabs located under **Tools → E-commerce Options**. Note that you can only use one broker at a time with Liberty.

Be sure to run the eBay Authorization Utility prior to synchronizing the first time. This procedure establishes the necessary links between Liberty and eBay so that information will flow seamlessly between the two.

About the Broker

Online brokers provide the integration with eBay necessary to allow Liberty to effectively and efficiently manage auctions. Brokers also provide secure checkout areas, which allow customers to checkout once an auction has been completed. This information, in the form of orders, is sent directly to Liberty whenever the synchronize button is pressed.

Brokers may also provide additional online storefronts for non-auction based sales (i.e., an online shopping cart like you'd find at major dot-com retail sites). This provides an additional channel for stores to sell their items.

Each broker requires an account be set up before their services can be utilized to post items to eBay. Currently Liberty supports direct integration to eBay using eBay's API framework and also integrates to Marketworks, a leading supplier of online management for auction services.

Copyright 2010, Resaleworld.com, Inc.

Synchronizing

Liberty's and downloads orders once their auctions are complete. Synchronizing also keeps Liberty up-to-date by downloading changes to eBay's Online Categories and Attributes.

The **Synchronize** routine allows Liberty to communicate information with various online services. Running the Synchronize routine causes the following actions to occur:

1. Items with a status of **Ready** are uploaded to the auction web site. When an item is successfully posted for auction its status changes from **Ready** to **Active**, and an **Auction ID** is assigned. Auction ID's may be viewed in the **Order Manager**.
2. All images for the Ready items are sent to the **Image Host**. The Image Host may be Resaleworld's FTP server or any other FTP server.
3. **Paid** and **Unpaid Orders** are downloaded from the auction web site.
4. Changes to eBay's **Online Categories** and **Attributes** are downloaded into Liberty.

If you are using eBay as your broker, and there is an error posting an item during the ***post item*** portion of the synchronization, an error message will appear in the Errors column of the **Auction Items Maintenance** window.

> ***Note:*** *The synchronization process occurs in the background: nothing will be displayed on your screen during the process to inform you of its progress. The only indication that a synchronization is taking place will be that a program called RWX will display on your taskbar.* ***Do not click the Synchronize button more than once while the process is running.***

After the **Synchronization** is complete Liberty will return to a usable state.

To Synchronize:

1. Start the **Order Manager**.
2. Click the **Synchronize** button **ONCE**. The Synchronize button may be found on the Taskbar, which is located on the far left side of the Order Manager screen.

Warning: Do not stop the synchronization process while it is running. Doing so may result in data inconsistencies.

The synchronization process occurs in the background: nothing will be displayed on your screen during the process to inform you of its progress. The only indication that a synchronization is taking place will be that a program called RWX will display on the taskbar. Do not click the Synchronize button more than once while the process is running.

Copyright 2010, Resaleworld.com, Inc.

If you are using eBay as your broker, and there is an error posting an item during the ***post item*** portion of the synchronization, an error message will appear in the Errors column of the **Auction Items Maintenance** window.

After the **Synchronization** is complete Liberty will return to a usable state. When an item is successfully posted for auction its status is changed from **Ready** to **Active**, and an **Auction ID** is assigned. Auction ID's may be viewed in the **Order Manager**.

Related Topics

eBay Authorization Utility

Synchronizing with the Auction Website

Synchronization Error Messages

Scheduling Automatic, Unattended Synchronizations

SYNCHRONIZING WITH THE AUCTION WEBSITE

Start → Programs → Liberty4 Trading Assistants → Liberty Order Manager

The **Synchronize** routine is allows Liberty to communicate information with various online services. Running the Synchronize routine causes the following actions to occur:

1. New, **Ready** items are uploaded to the auction web site,
2. All images for the Ready items are sent to the **Image Host**, whether it is Resaleworld's FTP server or another FTP server,
3. Paid and Unpaid orders are downloaded from the auction web site, and
4. Changes to eBay's Online Categories and Attributes are downloaded into Liberty.

In order to synchronize with eBay it is necessary to have

1. An **Authorized eBay Auction ID**, and
2. A **Verified Broker ID**.

In order to authorize the eBay Auction ID (which is entered under **Tools** → **Ecommerce Options** → **Accounts** in the **Auction Accounts** field), the **eBay Authorization Utility** must be run.

To Run the eBay Authorization Utility:

1. Click on the **Start** button, then select **Run**.
2. Enter the following command in the dialog: ***c:\rwd\eBayAuthUtil.exe***
3. Select the **Auction ID** to be authorized, then click **Authorize This Account**.
4. Read the instructions carefully. **DO NOT CLOSE OUT THE FIRST WINDOW THAT APPEARS BY CLICKING OK**. This window must stay open until the very end of this process.
5. Once you have a successful authorization, verify the **Broker** information. This is provided to you by the Resaleworld Sales Department upon purchasing Liberty, or emailed to you if you register online.
6. Navigate to **Tools** → **Ecommerce Options** → **Account**
7. Select eBay as the **Broker** under **Select Broker To Modify**.
8. Enter an email address in the **User ID** field (this email is only used internally with Resaleworld.com – eBay buyers will not see this address).
9. Enter the **Password** provided by Resaleworld.

To Synchronize:

1. Start the **Order Manager**.
2. Click the **Synchronize** button on the Taskbar, which is located on the left side of the screen.

Warning: Do not stop the synchronization process while it is running. Doing so may result in data inconsistencies.

The synchronization process occurs in the background: nothing will be displayed on your screen during the process to inform you of its progress. The only indication that a synchronization is taking place will be that a program called RWX will display on your taskbar. Do not click the Synchronize button more than once while the process is running.

Copyright 2010, Resaleworld.com, Inc.

If you are using eBay as your broker, and there is an error posting an item during the ***post item*** portion of the synchronization, an error message will appear in the Errors column of the **Auction Items Maintenance** window.

After the **Synchronization** is complete Liberty will return to a usable state. When an item is successfully posted for auction its status is changed from **Ready** to **Active**, and an **Auction ID** is assigned. Auction ID's may be viewed in the **Order Manager**.

Related Topics

Synchronization Error Messages

Scheduling Automatic, Unattended Synchronizations

Overview of the Order Manager

THE SYNCHRONIZATION LOG FILE

When attempting to synchronize Liberty with eBay, it is possible that you will encounter a variety of error messages. Sometimes an error can prevent items from listing on eBay, sometimes it will just warn you of an issue. Use the list below to troubleshoot the errors you might be seeing in your Log File.

The Log File can be viewed while in **Auction Items** by clicking the **View Log** button, which may be found on the left side of the window. The actual Log File itself can be found on your Server in **C:\RWD\LOG** - it will be the file named **RWX.log**.

The Log File tracks, step-by-step, line-by-line, what is occurring while Liberty attempts to synchronize with eBay. The Log File will typically flow along the lines described in the following **Example:**

- ** Daily Synch - Start - vx.x.x.x ****
  This will be the first line of your Log File if it is the first synch of the day
  ** Item Synch - Start - vx.x.x.x **
  This will be the first line of your Log File for all subsequent synchs that day
  Purge Log Files
  This is a purge of all outdated files used to synch items with eBay

Connecting to internet
This one should be pretty clear
Connected
Ditto
Process AW eBay Items - Start
Process AW eBay Items - End
Process AW eBay Motors Items - Start
Process AW eBay Motors Items - End
Process AW Store Items - Start
Process Next Item - Start
No items to send
Process Next Item - End
Process AW Store Items - End
The above lines are specific only to those who are listing items via Marketworks/Auctionworks
Process eBaThis is the first line you will see when Liberty attempts to process your Auction Items to eBayGet Session KeyValidating your authorized Auction ID and Broker InformationProcess Next Item - StartThis should be pretty clearprocessing item :xxxx (where x is equal to your Item ID)This should also be pretty clearUpload ImagesThis is the point at which Liberty looks to the Server's specified Image Path which has been specified under Tools Ecommerce Options GeneralImage upload : C:\RWD\Image\xxxxA.jpg (where x is equal to your Item ID)Image upload : C:\RWD\Image\xxxxB.jpgThis is where your Images actually beginning to upload to your Image Host. Notice that each image is named the same thing as your Item ID plus a letter (A, B, C, etc.)Upload ItemAt this point, if your item was successfully launched to eBay, you will see ...Item Listed - xxxx-xx-xx (date) xx:xx:xx (time) - xxxxxxxxxx (Auction ID)Send Uploaded Item to auctionIf you do not see this, you are most likely seeing some type of Serious Error (see the bottom of this article for a list of errors and what the mean).No more items to send-Process Next Item - EndProcess eBayAPI Items - EndLiberty has finished synchronizing eBay ItemsProcess eBayAPI Motors Items - StartProcess Next Item - StartNo items to sendProcess Next Item - EndProcess eBayAPI Motors Items - EndThis is the sequence Liberty goes through to upload an items selected to go to eBay MotorsProcess AW Order Broker - StartUpdate Item StatusUpdate OrdersSending Order RequestReceived Order RequestFinished Processing OrdersProcess AW Order Broker - EndThis is where Liberty attempts to update any orders or items from Marketworks that will come back down once the listing has endedProcess eBayAPI Orders - StartUpdate Item StatusUpdate Auction StatusUpdate Auction Status for xxxxxxxx (your eBay Auction ID)Update Order StatusUpdate orders for xxxxxxxx (your eBay Auction ID)Process eBayAPI Orders - EndThis is where Liberty attempts to update any orders or items from eBay that will come back down once the listing has endedProcess Emails - StartProcess Emails - End-This is where Liberty processes any Shipping Notification emailsCheck for new eBay Categories - StartLocal Version: 47 - Remote Version: 47Check for new eBay Categories - EndCheck for new eBay Motors Categories - StartLocal Version: 27 - Remote Version: 27Check for new eBay Motors Categories - EndCheck for new eBay Cat2Attr -

StartLocal Version: 2765 - Remote Version: 2768Download New Cat2Attr - Start-Download New Cat2Attr - EndeBay Cat2Attr - Saved to - C:\RWD-\Updates\EBayCat2Attr.xmlCheck for new eBay Cat2Attr - EndCheck for new eBay Motors Cat2Attr - StartLocal Version: 2765 - Remote Version: 2768Download New Cat2Attr - StartDownload New Cat2Attr - EndeBay Motors Cat2Attr - Saved to - C:\RWD\Updates\EBayMotorsCat2Attr.xmlCheck for new eBay Motors Cat2Attr - End-Check for new eBay Attribute - StartLocal Version: 2765 - Remote Version: 2768-Download New Attributes - StartDownload New Attributes - EndeBay Attribute - Saved to - C:\RWD\Updates\EBayAttributes.xmlCheck for new eBay Attribute - EndCheck for new eBay Motors Attribute - StartLocal Version: 2765 - Remote Version: 2768-Download New Attributes - StartDownload New Attributes - EndeBay Motors Attribute - Saved to - C:\RWD\Updates\EBayMotorsAttributes.xmlCheck for new eBay Motors Attribute - EndParse eBay Cat2Attr Files - StartParse eBay Cat2Attr Files - EndParse eBay Attributes - StartParse eBay Attributes - EndParse eBay Motors Attributes - Start-Parse eBay Motors Attributes - EndThis long sequence above is what happens when Lib-erty checks for new Categories and Attributes. If theLocal Version(your current version) is less than theRemote Version(eBay's current version), then Liberty will attempt to down-load and parse this data for use within the Liberty application.**** Daily Synch - End ****This is the end of the synch.

Related Topics

Synchronization Log Error Messages

Synchronization Log Error Messages

The errors listed below represent common problems. There are many other possible errors that might occur. If after reviewing this information and verifying all settings you are still unable to synchronize Liberty with eBay, please check the Resaleworld Online Knowledge Base (on the Message Board) for further information.

Error Message	Meaning of Error Message

Error Creating Broker - ERROR: Account not found.	If you are seeing this error, then the **User ID** and/or **Password** under **Tools** → **Ecommerce Options** → **Accounts** does not match the information you setup with the Resaleworld Sales Department or when signing up via our web site. If this information does not match exactly or if it is changed, then you will be unable to synchronize with eBay. If you have lost or forgotten this information, you will need to contact Technical Support to have this information re-set. Only support can reset this password. Once it has been reset, you can logon to the Broker Management page to edit this password. The key is the information on the Broker page needs to exactly match your Ecommerce Options.
Auction Account xxxxxxxx has not been authorized.	This means that the **Auction ID** has not yet been authorized. See the section entitled eBay Authorization Utility for more information.
Serious Error: You specified inconsistent Shipping parameters.	This will occur if the item you are attempting to list does not match up with the shipping parameters you have indicated in your Shipping Profile. For example, this error would occur if you tried to upload an elephant with a weight of 5,000 pounds and have specified it would be shipped via USPS letter. Since a Serious Error is one generated by eBay, you will need to determine what settings eBay is rejecting. There are myriad ways to configure shipping, so locating the error takes a little detective work on your part. A good place to start looking is the Shipping Info tab under the Auction Detail tab in Item Entry.
Warning:	This will typically not prevent an item from being listed to eBay. The Warning will have further details about why eBay generated the Warning. This is typically for **Payment Methods** not matching.
Serious Error: No Location exists or Location is specified as an empty tag in the XML request.	The Location field under **Tools** → **Ecommerce Options** → **General** is empty. Enter some text in here such as City, State or even something such as Sunny Florida (just an example).
The item was not found. (xxxx) - WebOrderId - xxxxxxx/ Item	This usually shows up in the Log File after Update Orders. You will see these if you have launched any auctions outside of the Liberty application. Liberty will try to synch all orders for your Auction ID. If you listed items with that same Auction ID outside of Liberty, the program will be unable to pull down this order/item since it was never in Liberty's inventory.

Related Topics

Synchronization Error Messages

SYNCHRONIZATION ERROR MESSAGES

On occasion you may receive an error message while attempting to synchronize. Following is a list of common error messages and their meaning.

Error Message	Meaning of Error Message
Serious Error	This is a message from eBay (not Resaleworld or the Liberty program). It usually indicates that content has been rejected, a shipping conflict exists, that there are item listing conflicts, etc.
Account Not Authorized	Indicates the Auction Account being used has not been authorized. To resolve this problem, run the **eBayAuthUtil.exe** program, select **Authorize This Account** and follow the on-screen prompts that take you to eBay.
Error Creating Broker	Indicates the Broker ID specified under **Tools** → **Ecommerce Options** → **Accounts** → **Select Broker to Modify** does not match the one Resaleworld.com has created, or that a Broker has yet to be created. To create a Broker ID, contact the Resaleworld sales department or register online at www.resaleworld.com.
Image Not Found	This error is generally seen in a Network environment when one or more of the Client PCs on the Network has an invalid Image Path specified under **Tools** → **Ecommerce Options** → **General**. When running Liberty on a network, the image path on the client's PC is different than the image path set on the server. Whereas on the server it is **C:\RWD\Image**, on the workstations (client PCs) it must be **X:\Image**, with **X:** representing the network drive letter mapped to the RWD directory on the server.

Copyright 2010, Resaleworld.com, Inc.

	For example, if the drive letter **H:** represents the **C:\RWD** drive and folder on the server, then **H:\Image** should be entered as the drive path.
File Access Denied	Something is blocking access to the images you are attempting to upload. This could be caused by a number of reasons. Typically though, this is due to the image(s) being **Read Only**. To verify if your files are Read Only or not, make a note of the Item ID you are trying to synch in Auction Items (i.e. 1072). Next browse to **My Computer > Local Disk C:\ > RWD > Image** (or wherever your Image Path under **Tools > Ecommerce Options** is saving images to). Locate the images that match this Web Item (i.e. 1072A.jpg, 1072B.jpg, etc.). Once you have located at least one of these images, right-click on it and choose **Properties**. Verify if the **Read Only** attribute is selected. If so, **uncheck/de-select it**, click **Apply** and then click **OK**. Try synchronizing your item again and you should see it go through. If you still experience File access denied errors contact your system administrator or a technician to verify that you have sufficient access to the folders Liberty is utilizing for synchronizing.
Socket Error: 10061	This error message indicates network communications between the Clients and the Server is being disrupted - usually by a Firewall. If you can synch from the Server, but not the Clients, it is most likely the Clients are being blocked by a Firewall. If you cannot synch from any PC, make sure the Helper Service is running

Related Topics

Synchronizing with the Auction Website

Scheduling Automatic, Unattended Synchronizations

The Synchronization Log File

Copyright 2010, Resaleworld.com, Inc.

SCHEDULING AUTOMATIC, UNATTENDED SYNCHRONIZATIONS

It is often desirable to schedule auctions to be uploaded at a specific time each day. The problem with this is that to accomplish this task consistently it is necessary to a) have someone available to initiate the synchronization at the required time and b) to actually remember to start the synchronization.

Since synchronizations sometimes need to take place outside of regular business hours, and because human memory is fallible, a solution to these problems is provided with the **RWXLauncher** program. Using the RWXLauncher in conjunction with Window' Task Scheduler solves these problems by automating the synchronization process. As a result it is not necessary to have someone remember and be available to start the process, as it will start automatically.

Following are instructions on setting up the RWXLauncher and Task Scheduler to schedule hourly synchronizations. As you will see it is easy to customize the process to synchronize at intervals other than each hour.

> ***Note:*** *This task is only to be scheduled for the Server; make sure the server is left on so the task can run.*

To Schedule Synchronizations to Occur Automatically:

1. Select **Start** → **Settings** → **Control Panel**.
2. Double-click on the **Scheduled Task** icon.
3. Double-click on **Add Scheduled Task**.
4. Click **Next**.
5. Click the **Browse** button.
6. Click the **Look In** drop-down menu and select **Local Disk (C:\)**.
7. Double-click on the **RWD** folder.
8. Double-click on **RWXLauncher.exe** program (if you are running a version of L4TA

prior to version 2.1b, choose Rwx.exe instead).

9. Select when you would like to **Perform this Task** (generally daily).
10. Click **Next**.
11. Under **Perform This Task**, choose **Everyday**.
12. Click **Next**.
13. Enter your **Computer Login Name** and **Password**.
14. Confirm the password.
15. Click on **Next**.
16. Put a check mark next to **Open advanced properties for this task when I click Finish**.
17. Click **Finish**.
18. Click on the **Schedule** tab.
19. Click **Advanced**.
20. Put a check mark next to **Repeat Task**.
21. Set the task to run every **1 hours** (or less often if you do not need to synch with eBay that often).
22. Click to select the little circle next **Duration** and set it to run for 1 hour and 1 minute.
23. Put a check mark next to **If the task is still running, stop it at this time**.
24. Select **OK**, the **Apply**, then **OK**.

Related Topics

Synchronizing with the Auction Website

Synchronization Error Messages

LIBERTY TAG STYLES

This topic discusses the tag styles (tag formats) that can currently be generated with Liberty4 Consignment:

Copyright 2010, Resaleworld.com, Inc.

***NOTE:** The images below were created using the 2844 tag styles. The 2824 styles will look identical.*

- The 2622/2722 are the same as the 2824 style printers
- The 2433 and 2443 are the same as the 2844 style printers

Vertical Tag

Support
1-102521
5/14/2009
Level 3 Category
A *
Brand
$101.00
Att. #1, Att. #2, Att. #3, Att. #4, Att. #5, Att. #6, Att. #7
A LOT of text can fit into the Description on the Vertical Tag. While it's better to use Atts, this is still very handy...
Size: XL/Tall
1-102521
Retails @ $299.00
$101.00

Vertical Markdown Tag

Each of these tag styles print the following information:

- Store Name (auto sensing feature increases font size for shorter store names, decreases font for larger store names)
- Account-Item Number
- Item Received Date
- Level 3 Category (e.g., pants, shirt, etc.)
- Price Code
- Allow Donate Indicator
- Brand
- Price
- At least six Attributes depending on the length of each Attribute name
- Item Description
- Three lines of Markdowns (only on Vertical Markdown Tags-more Item Description text prints when not using Markdowns)
- Size
- Bar Code
- Retails @

2844 - Single Tag (Auction)

- Title in bold large type
- Two lines of attributes
- Barcode
- Item#
- Date
- Marketplace

NOTE: *This tag format does not have the store name or the price.*

2844 - Single Tag (More Attributes)

- Barcode
- Store Name
- Price Code/Cost

NOTE: *The Price Code will be printed unless cost/net has been populated. The cost/net will be printed encoded but only if the Print Cost checkbox was selected under Tools > Options > Printing.*

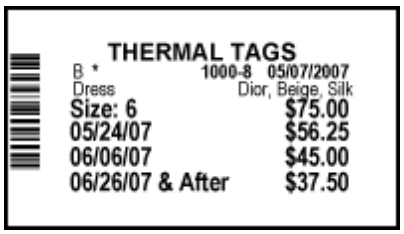
- Allow Donate Indicator *
- Item #
- Date
- Level 3 Category
- Brand
- Two lines of Attributes
- One line of Description
- Retails @
- Price

2844 - Single Tag (Fewer Attributes.)

- Barcode
- Store Name
- Price Code/Cost
- Allow Donate Indicator *
- Item #
- Date
- Level 3 Category
- Brand
- 1 line of Attributes
- 2 lines of Description
- Retails @
- Price

2844 - Single Tag (Markdown)

- Barcode
- Store Name
- Price Code/Cost
- Item #
- Date
- Level 3 Category
- 1/2 line of Attributes on same line as Level 3 Category
- Price
- Three lines of markdown



2844 - Single Tag (More Descriptions)

- Barcode
- Store Name
- Price Code/ Cost
- Allow Donate Indicator *
- Item #
- Date
- Level 3 Category
- Brand on same line as Level 3 Category
- Three lines of Description
- Retails @
- Price

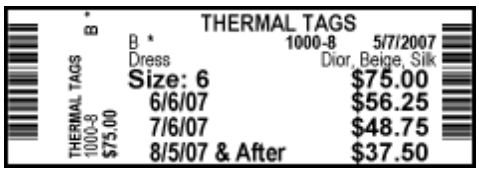
Copyright 2010, Resaleworld.com, Inc.

2844 - Regular

- Store name ("Thermal Tags")
- Allow Donate Indicator ("*")
- The Price Code ("B")
- Level 3 category ("Dress")
- Attributes - up to two lines ("Beige, Silk")
- Date item added to inventory ("5/7/2007")
- Account-Item number ("1000-8")
- Description - one line ("One of a kind dress")
- Brand ("Dior")
- Size ("6")
- Retail Price ("$525")
- Selling Price ("$75")
- Bar Code

2844 - Dual (Combined)

- Store name ("Thermal Tags")
- Allow Donate Indicator ("*")
- The Price Code ("B")
- Level 3 category ("Dress")
- Attributes ("Dior, Beige, Silk")
- Date item added to inventory ("5/7/2007")
- Account-Item number ("1000-8")
- Size ("6")
- Selling price ("$75.00")
- Three markdown levels ("6/6/07 $56.25, 7/6/07 $48.75, 8/5/07 & After $37.50")
- Bar Code

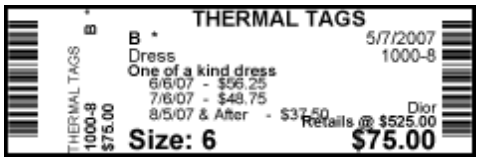


2844 - Dual (Combined) w/Description

- Store name ("Thermal Tags")
- Allow Donate Indicator ("*")
- The Price Code ("B")
- Date item added to inventory ("5/7/2007")
- Account-Item number ("1000-8")
- Description ("One of a kind dress")
- Size ("6")
- Selling price ("$75.00")
- Three markdown levels ("6/6/07 $56.25, 7/6/07 $48.75, 8/5/07 & After $37.50")
- Bar Code

2844 - Dual (Combined) w/Description Legacy

- Store name ("Thermal Tags")
- Allow Donate Indicator ("*")
- The Price Code ("B")
- Level 3 category ("Dress")
- Date item added to inventory ("5/7/2007")
- Account-Item number ("1000-8")
- Description ("One of a kind dress")
- Three markdown levels ("6/6/07 $56.25, 7/6/07 $48.75, 8/5/07 & After $37.50")
- Brand ("Dior")
- Retail Price ("$525")
- Size ("6")
- Selling Price ("$75")
- Bar Code



2844 - Both (2 Tags)

NOTE: *This tag style prints two tags for each item thereby using twice as many tags as the above tag styles and displays the most information:*

- Store name ("Support")
- Allow Donate Indicator ("*")
- Price Code ("B")
- Level 3 category ("Dress")
- Attributes - up to two lines ("Beige, Silk")
- Date item added to inventory ("5/7/2007")
- Account-Item number ("1000-8")
- Description - up to three lines ("One of a kind dress..... ")
- Three markdown levels ("6/6/07 $56.25, 7/6/07 $48.75, 8/5/07 & After $37.50")
- Brand ("Dior")
- Retail Price ("$525")
- Size ("6")
- Selling Price ("$75")
- Bar Code

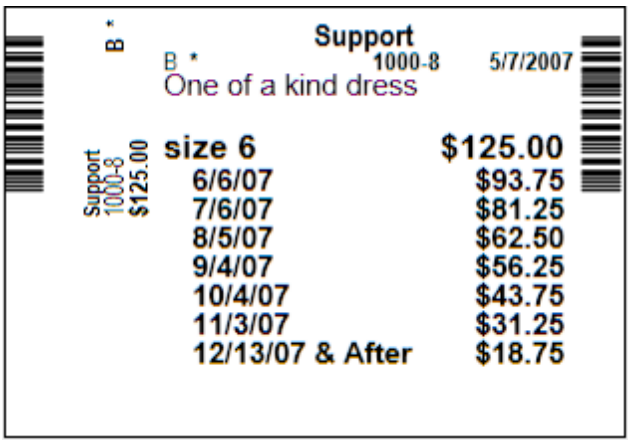
2844 - Markdown (10 line/2 Tags)

NOTE: *This tag style prints two tags for each item thereby using twice as many tags and displays the only tag style that displays more than three levels of markdowns:*

- Store name ("Support")
- Allow Donate Indicator ("*")
- The Price Code ("B") or Encoded Cost (if Cost/Net field was filled in)
- Date item added to inventory ("5/7/2007")

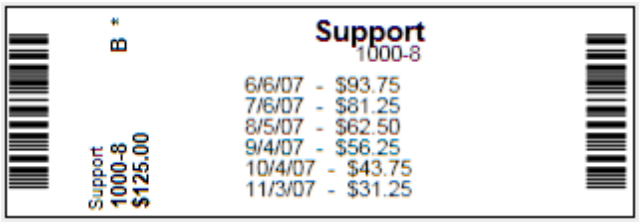
Copyright 2010, Resaleworld.com, Inc.

- Account-Item number ("1000-8")
- Description - up to two lines ("One of a kind dress.....")
- Nine markdown levels ("6/6/07 $56.25, 7/6/07 $48.75, 8/6/07 $37.50, 9/6/07 $29.80, 10/6/07 $21.25, 11/06/07 $18.50, 12/6/07 $13.85 ....etc.)
- Selling Price ("$75")
- Bar Code



2844 - Markdown

- Store name (“Support”)
- Bar code
- Price code
- Account-Item number
- Price
- Allow donate indicator
- Six lines of Markdowns



2844 - Mini

This tag style prints on smaller almost square stickers displays:

- Store name ("Thermal Tags")
- Bar Code
- Level 3 category ("Dress")

Copyright 2010, Resaleworld.com, Inc.

- Size ("6")
- Date item added to inventory ("5/7/2007")
- Account-Item number ("1000-8")
- Price Code ("B")
- Allow Donate Indicator ("*")
- Selling Price ("$75")

2844 - Jewelry

This tag style prints on the smallest tags that we sell and displays:

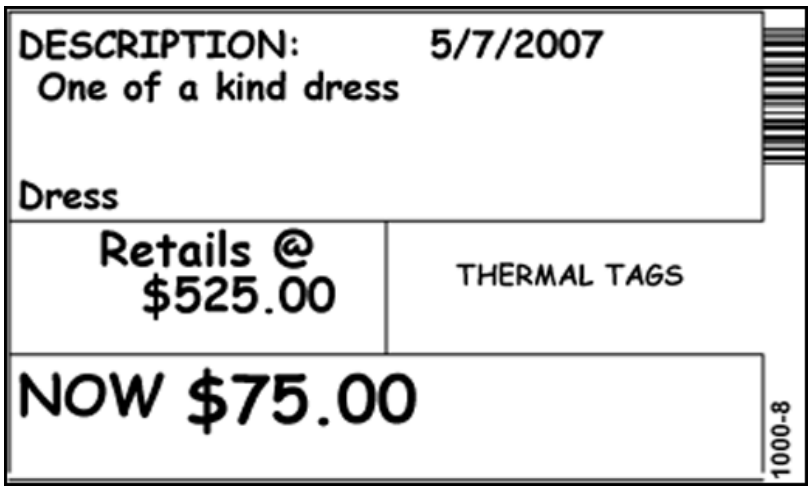
- Bar Code
- Level 3 category ("Dress")
- Account-Item number ("1000-8")
- Selling Price ("$75")

Furniture Tag - Style A

This tag style prints on a large 4"x6" sticker requiring the paper size setting in the Eltron printer driver to be changed to "Label 4.00 x 6.00" displays:

- Bar Code
- Description ("One of a kind dress")
- Date item added to inventory ("5/7/2007")
- Level 3 category ("Dress")
- Retail Price ("$525")
- Store name ("Thermal Tags")
- Selling Price ("$75")
- Account-Item number ("1000-8")

Copyright 2010, Resaleworld.com, Inc.



Connecting Your iPad and Liberty Item Entry App

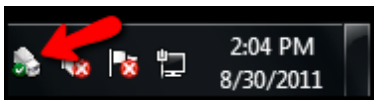
Setup

Step 1:

Make sure you have version Liberty 3.8c or above.

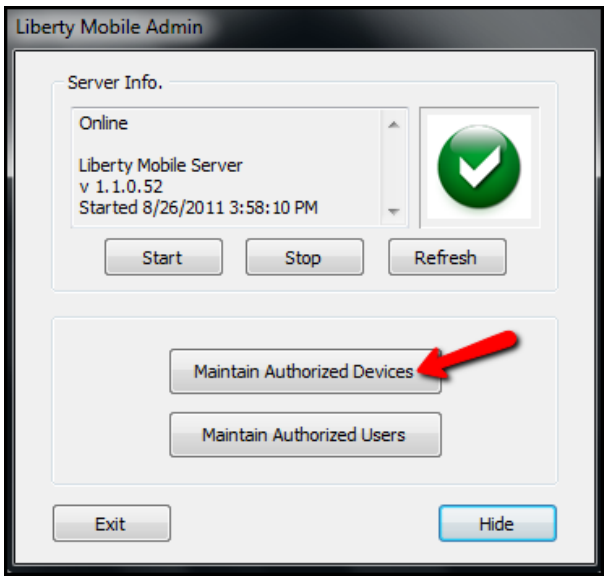
You will need to install Liberty Mobile Server located at *http://My.Resaleworld.com*.

The installer will put an icon for Liberty Mobile admin in your task bar (see below). Double-click to run.



Step 2:

Click the **Maintain Authorized Devices** button.



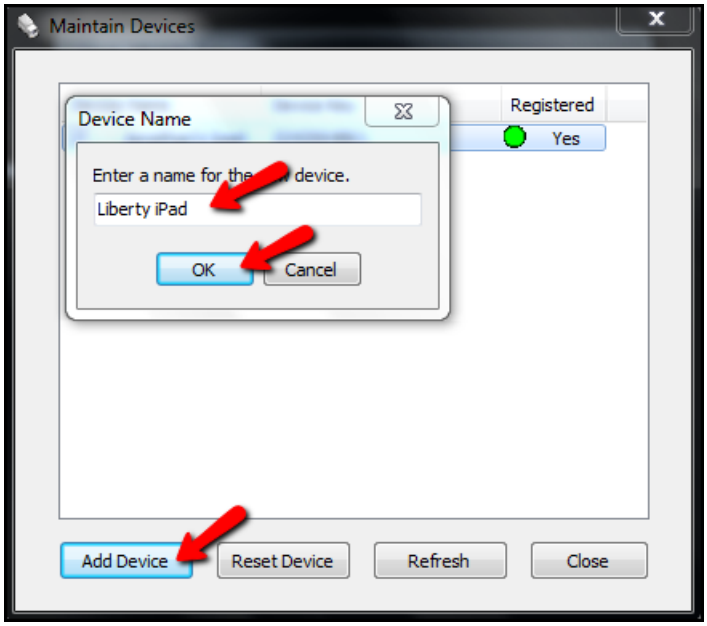
Step 3:

Sign in with an administrative level 10 account.

Step 4:

Click the **Add Device** button. In the **Device Name** window, enter a unique identity for the iPad you are adding and click **OK**.

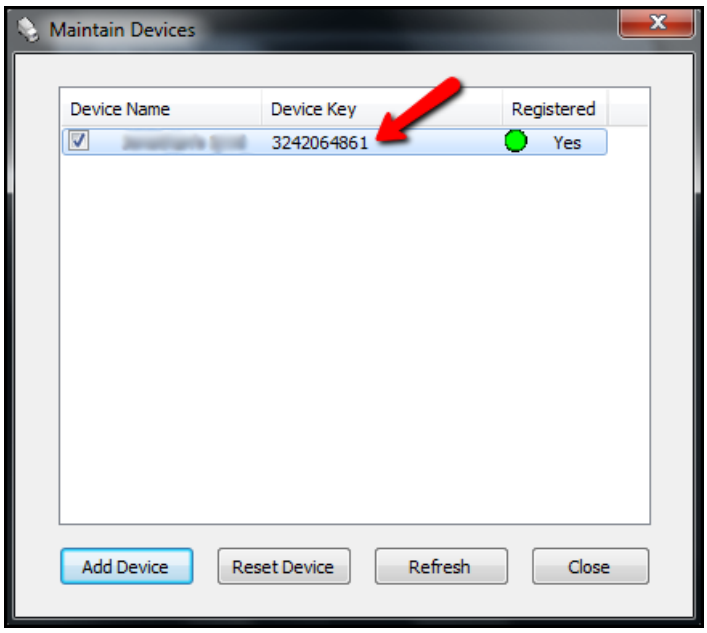
Copyright 2010, Resaleworld.com, Inc.



Step 5:

Make a note of your device key as you will need to input this in the L4C Item Entry application.

> ***NOTE:*** *Do not use the key in the image below as it is just an example.*

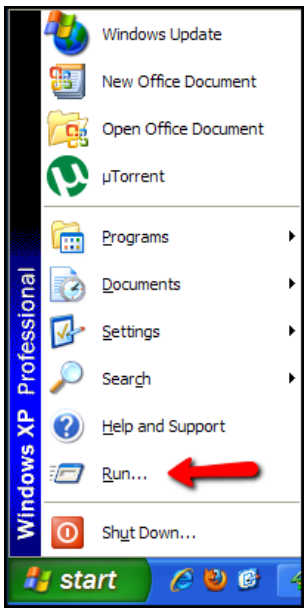


Step 6:

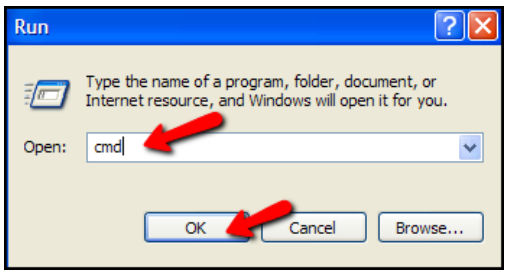
You will need to determine the server's IP address.

Finding The IP Address In Windows XP

Click on the **Start** menu and click **Run**.

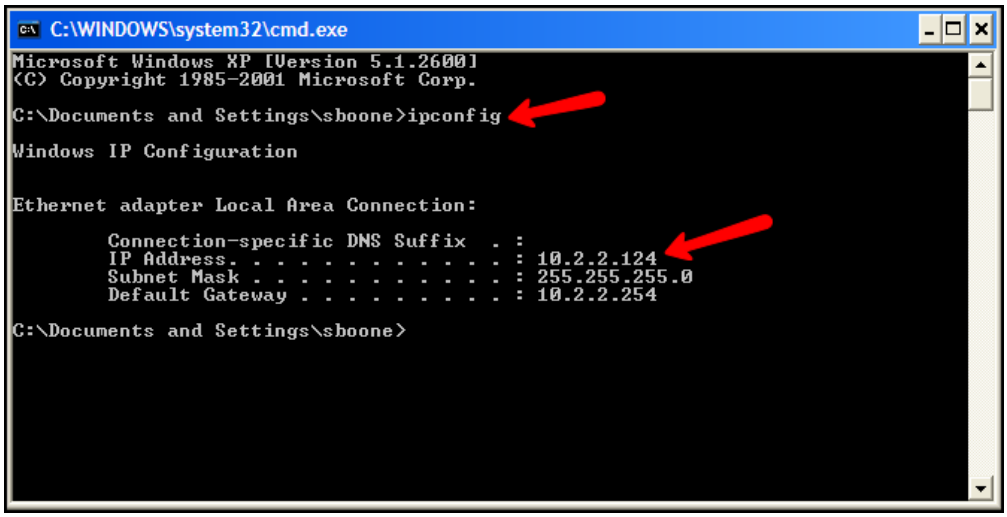


In the **Run** window, enter "cmd" in the **Open** field and click **OK**.



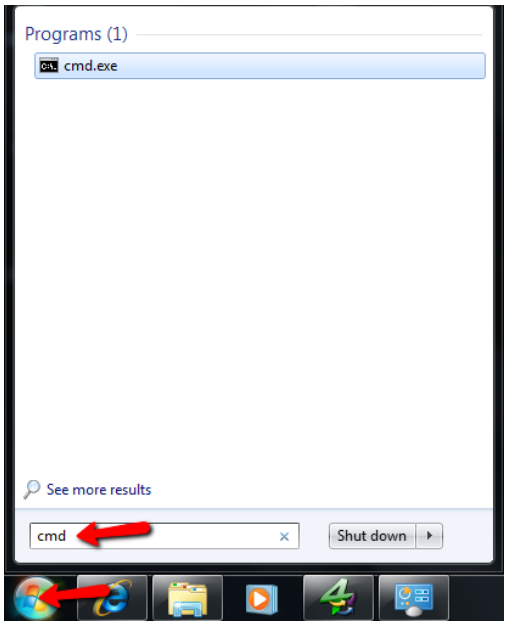
In the command window, enter "ipconfig" and press the **Enter** key on your keyboard. Make note of the IP address. The format of the IP address should be similar to 192.168.X.X or 10.X.X.X

The IP address will be entered into the Liberty Item Entry application on the iPad in the next step.


C:\WINDOWS\system32\cmd.exe
Microsoft Windows XP [Version 5.1.2600]
(C) Copyright 1985-2001 Microsoft Corp.
C:\Documents and Settings\sboone>ipconfig
Windows IP Configuration
Ethernet adapter Local Area Connection:
Connection-specific DNS Suffix . :
IP Address. . . . . : 10.2.2.124
Subnet Mask . . . . . : 255.255.255.0
Default Gateway . . . . . : 10.2.2.254
C:\Documents and Settings\sboone>

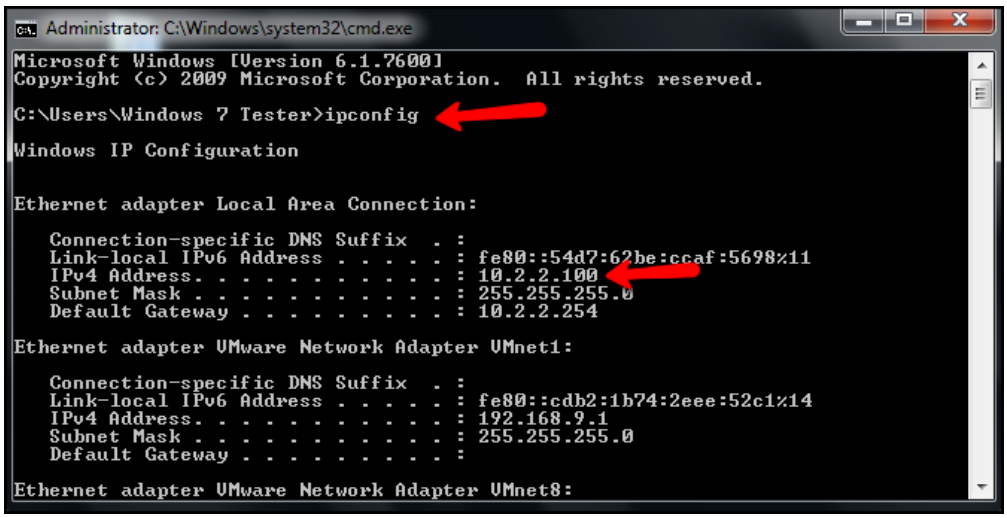
Finding The IP Address In Windows 7

Click the **Start** button and enter "cmd" in the text field directly above the Start button. Press the **Enter** key on the keyboard.



In the command window, enter "ipconfig" and press the **Enter** key on your keyboard. Make note of the IPv4 address. The format of the IPv4 address should be similar to 192.168.X.X or 10.X.X.X

The IP address will be entered into the Liberty Item Entry application on the iPad in the next step.


Administrator: C:\Windows\system32\cmd.exe
Microsoft Windows [Version 6.1.7600]
Copyright (c) 2009 Microsoft Corporation. All rights reserved.
C:\Users\Windows 7 Tester>ipconfig
Windows IP Configuration
Ethernet adapter Local Area Connection:
Connection-specific DNS Suffix . :
Link-local IPv6 Address . . . . . : fe80::54d7:62be:ccaf:5698%11
IPv4 Address. . . . . : 10.2.2.100
Subnet Mask . . . . . : 255.255.255.0
Default Gateway . . . . . : 10.2.2.254
Ethernet adapter VMware Network Adapter VMnet1:
Connection-specific DNS Suffix . :
Link-local IPv6 Address . . . . . : fe80::cdb2:1b74:2eee:52c1%14
IPv4 Address. . . . . : 192.168.9.1
Subnet Mask . . . . . : 255.255.255.0
Default Gateway . . . . . :
Ethernet adapter VMware Network Adapter VMnet8:

Step 7:

Tap the “+” button if the screen below does not appear.

In the **Description** field, enter “Liberty Mobile Server”.

Copyright 2010, Resaleworld.com, Inc.

For the **Key** field, enter the "Device Key" for the device you created in Step 5.

You will need to determine your network's external IP address and enter it into the **Server Address** field. Navigate to *http://whatismyip.com* to get this information.

Click the **Submit** button.

Step 8:

Sign in and you are ready to use the L4C Item Entry App.

iPad
8/29 - 3:02 - 44MB
89 %
Edit Server
Login
LIBERTY 4
consignment
Item Entry App
Username
Username
Password
Password
Submit

ADDING A NEW CLIENT

Selecting the Add Client Button

After signing in to the Liberty Item Entry Application, tap the **Add Client** button located in the top right corner.

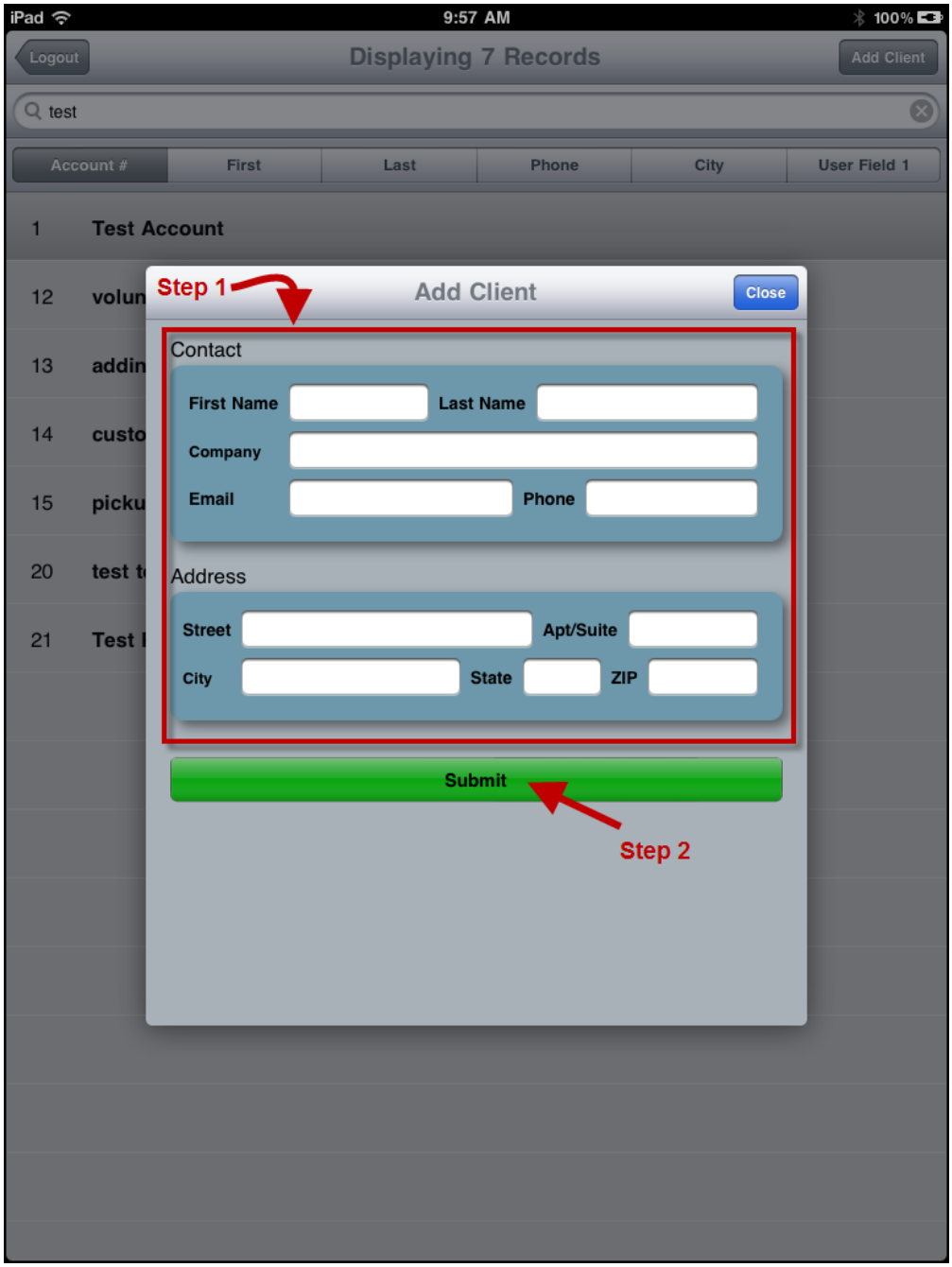
Inputting Client Account Information

Step 1:

Enter the new account information in the **Add Client** application window.

Step 2:

Tap the **Submit** button when finished.



EDITING AN EXISTING ACCOUNT

Selecting a Client Account to Edit

Step 1:

Select the type of sort criteria.

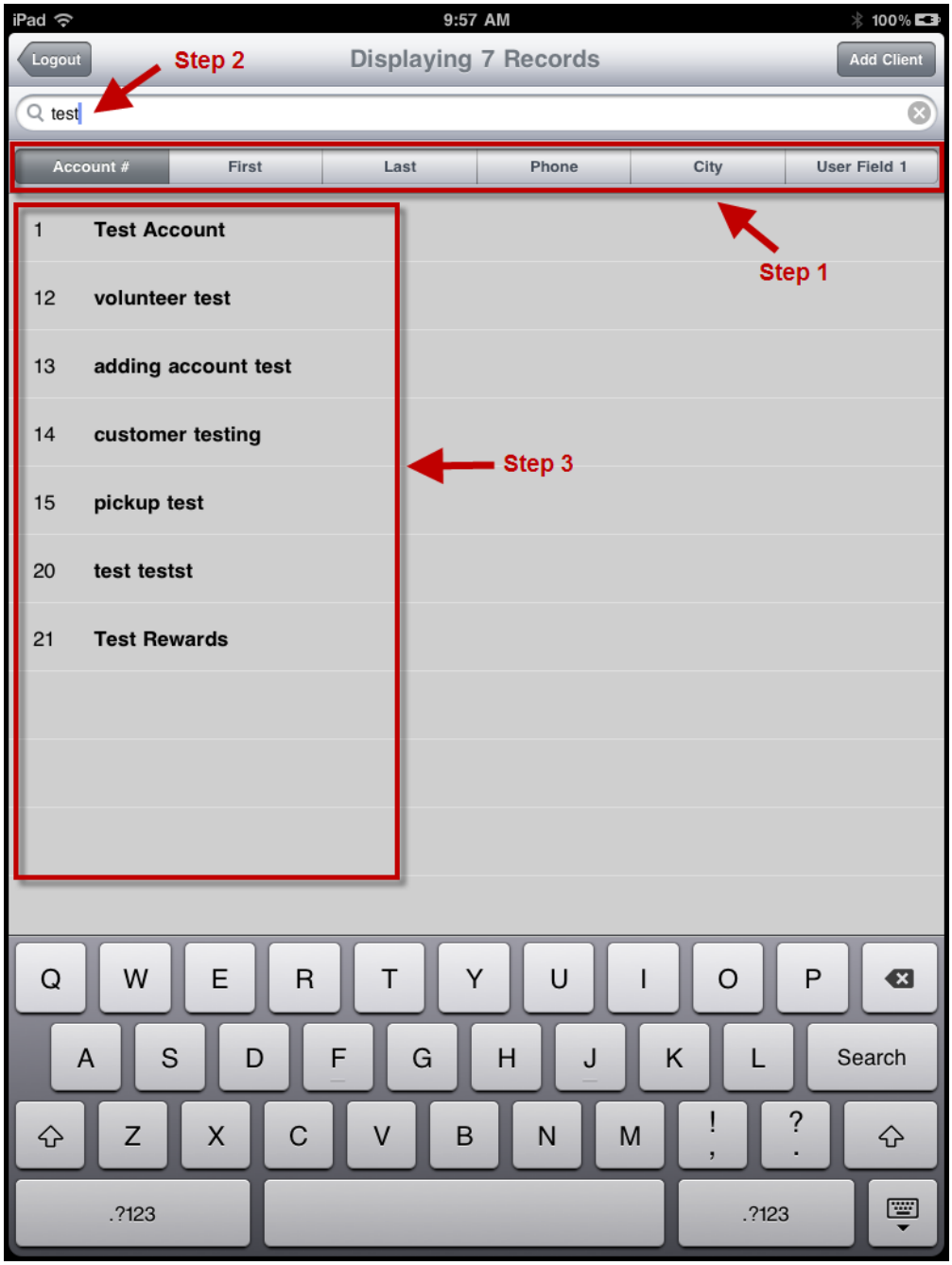
Step 2:

Enter account information within the search field relative to the selected criteria to search.

Step 3:

Tap the account to open it.

Copyright 2010, Resaleworld.com, Inc.



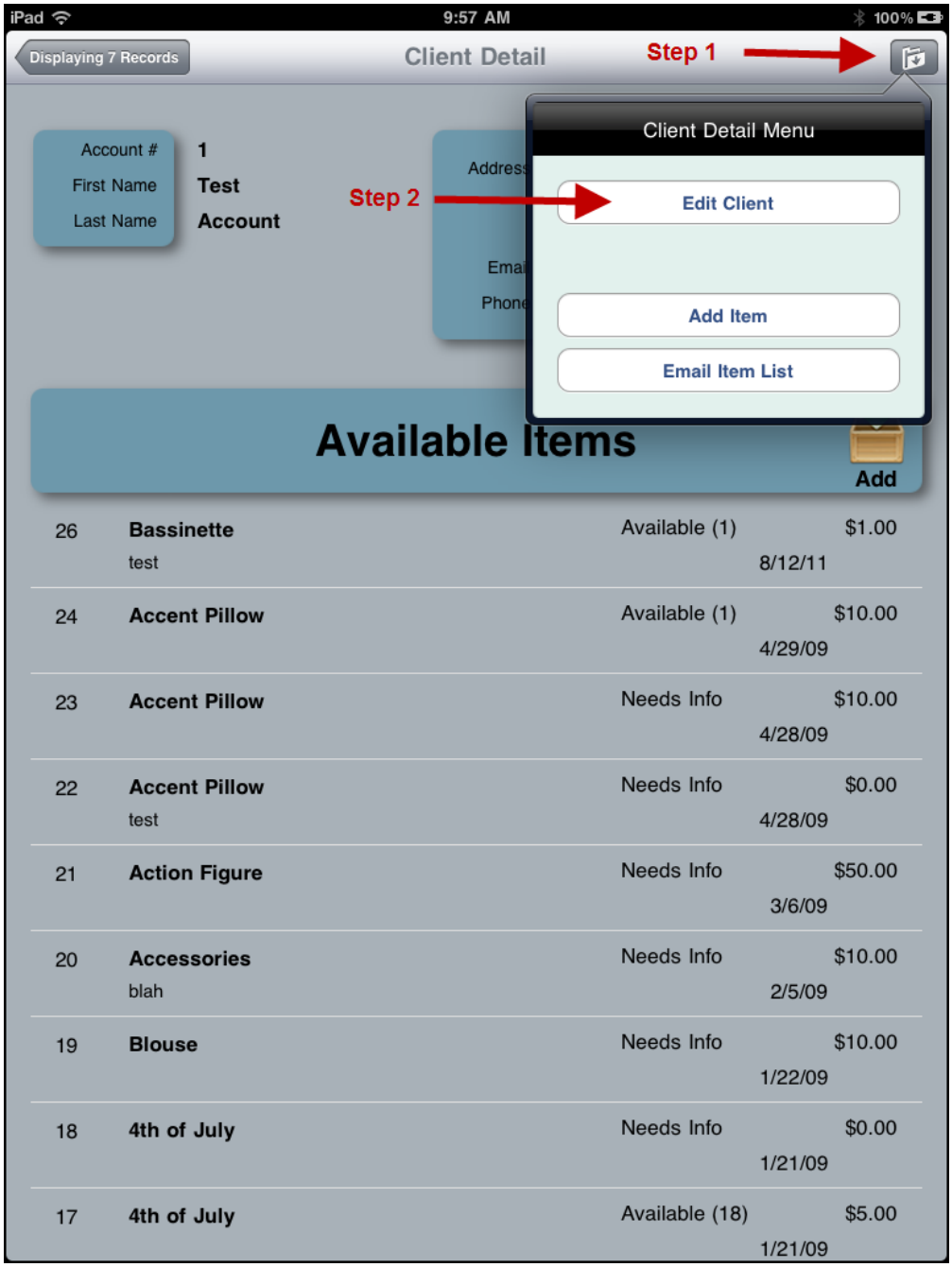
Selecting the Edit Client Button

Step 1:

Tap the Folder icon located at the top right section of the Liberty Item Entry application.

Step 2:

Tap the **Edit Client** button.



Editing the Pre-Existing Information for the Client Account

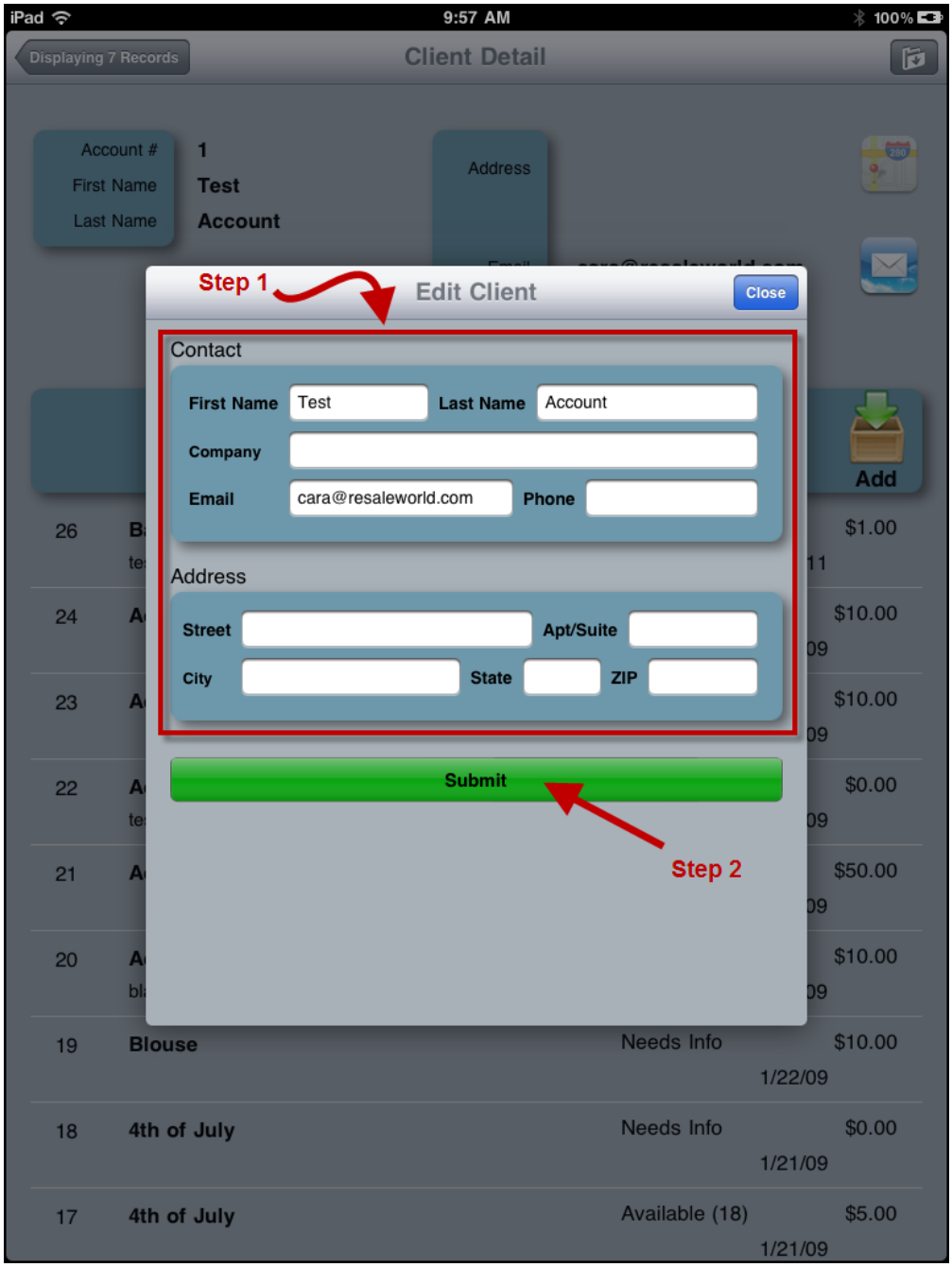
Step 1:

Tap the fields you wish to edit and enter the updated information as needed.

Copyright 2010, Resaleworld.com, Inc.

Step 2:

Tap the **Submit** button.



ADDING ITEMS TO A CLIENT ACCOUNT

Selecting the Account for Item Entry

Step 1:

Select the type of sort criteria.

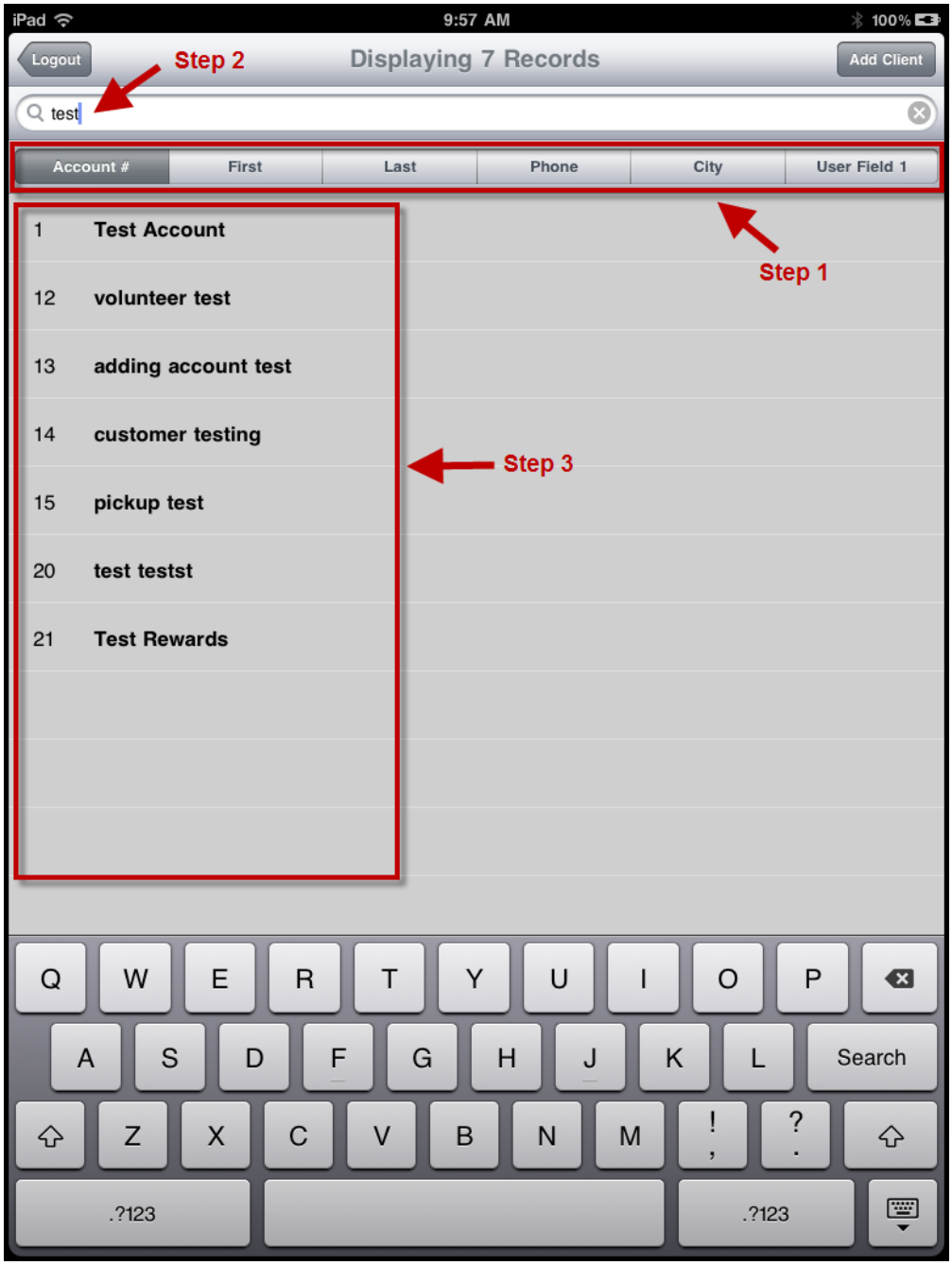
Step 2:

Enter account information within the search field relative to the selected criteria to search.

Step 3:

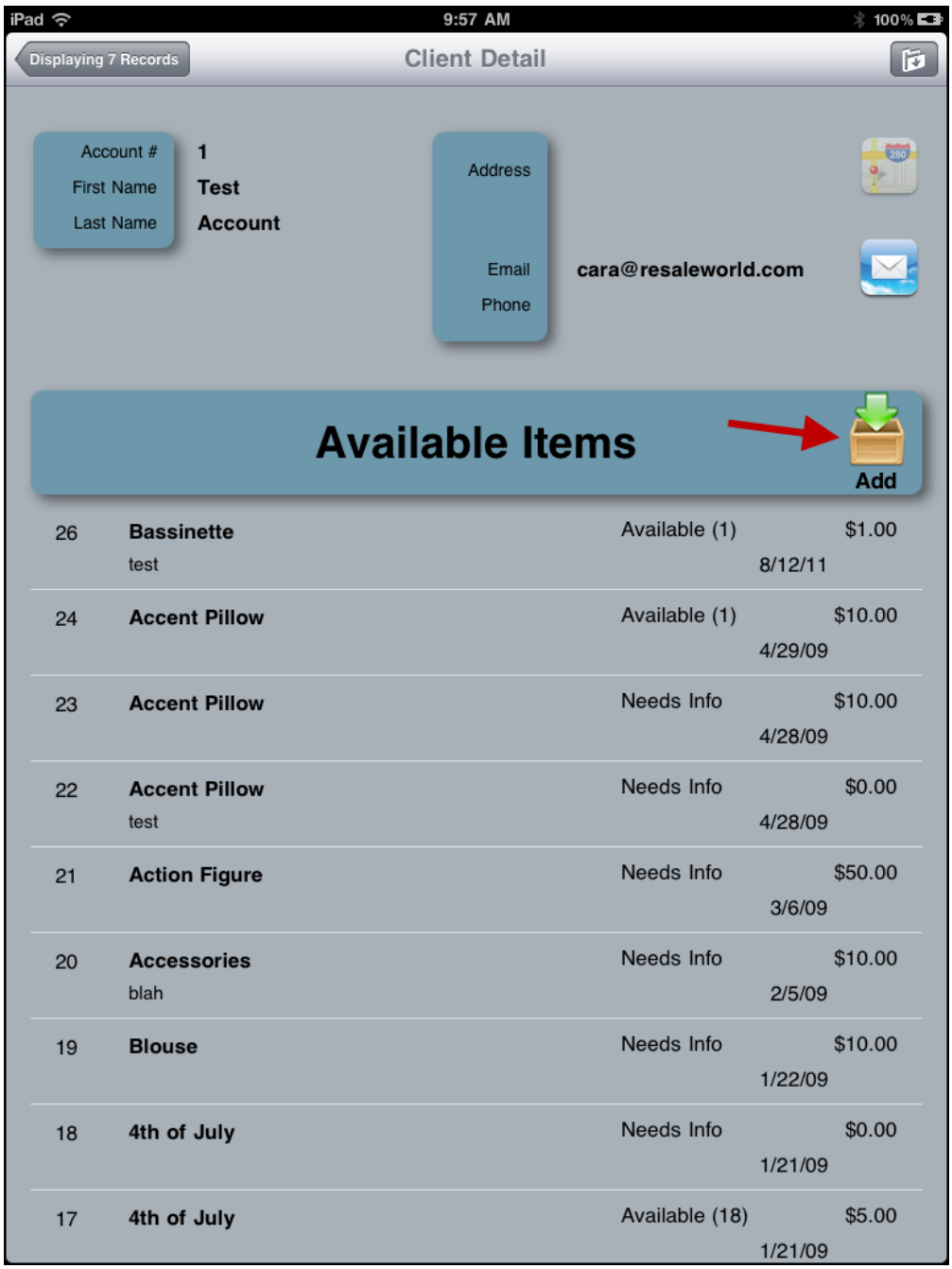
Tap the account to open it.

Copyright 2010, Resaleworld.com, Inc.



Select the Add Button

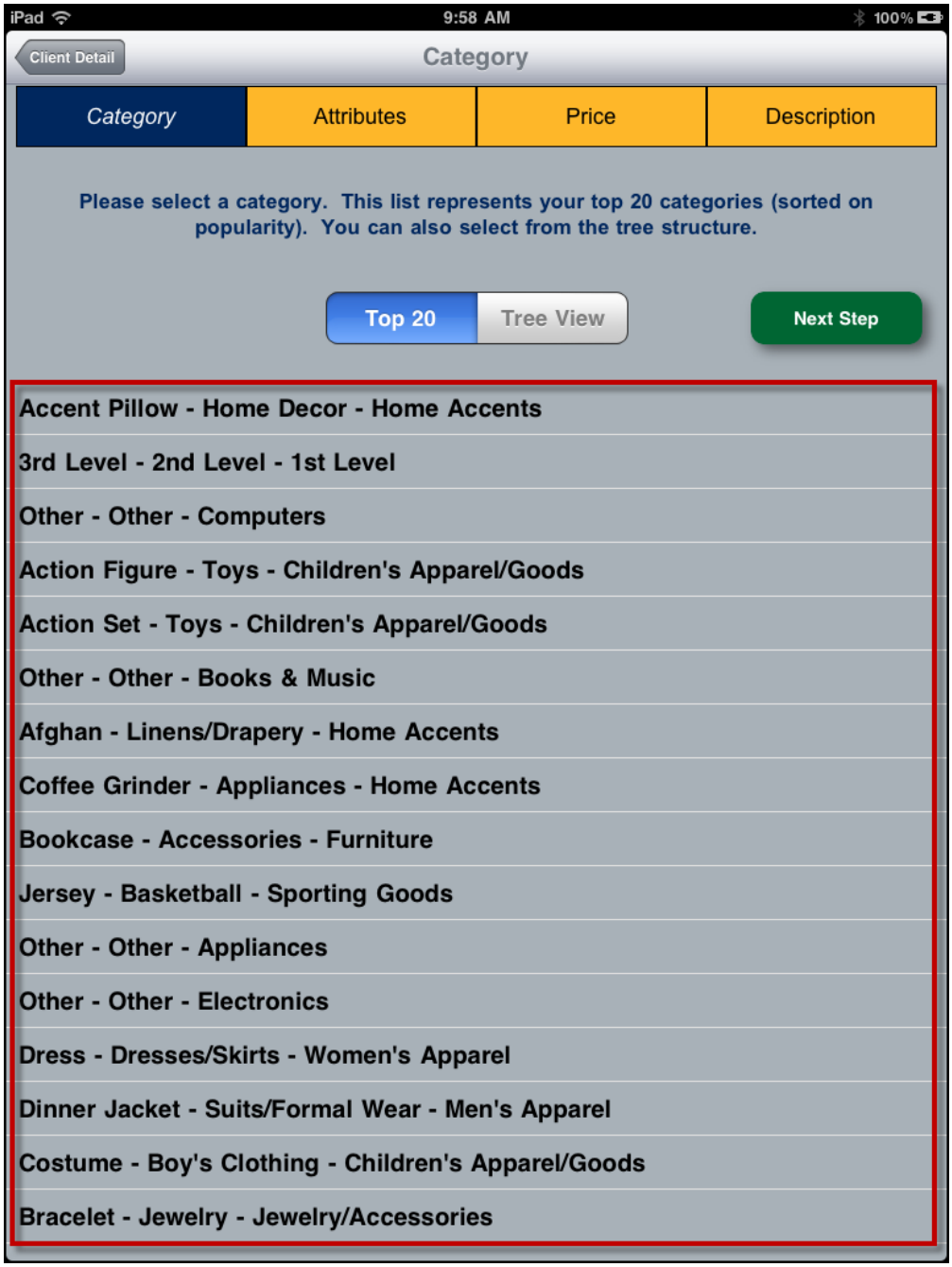
Tap the **Add** icon to begin adding an item to the account.



Select a Category

The first screen will show the Top 20 categories by popularity. You can choose to use the traditional Tree View if the category you want to use is not in this list.

Tap the category to be used for the item.


iPad
9:58 AM
100%
Client Detail
Category
Category
Attributes
Price
Description
Please select a category. This list represents your top 20 categories (sorted on popularity). You can also select from the tree structure.
Top 20
Tree View
Next Step
Accent Pillow - Home Decor - Home Accents
3rd Level - 2nd Level - 1st Level
Other - Other - Computers
Action Figure - Toys - Children's Apparel/Goods
Action Set - Toys - Children's Apparel/Goods
Other - Other - Books & Music
Afghan - Linens/Drapery - Home Accents
Coffee Grinder - Appliances - Home Accents
Bookcase - Accessories - Furniture
Jersey - Basketball - Sporting Goods
Other - Other - Appliances
Other - Other - Electronics
Dress - Dresses/Skirts - Women's Apparel
Dinner Jacket - Suits/Formal Wear - Men's Apparel
Costume - Boy's Clothing - Children's Apparel/Goods
Bracelet - Jewelry - Jewelry/Accessories

Selecting Attributes

Step 1:

The top attribute types displayed are directly controlled by the Liberty category editor.

This will display the top 20 values for the attribute selected.

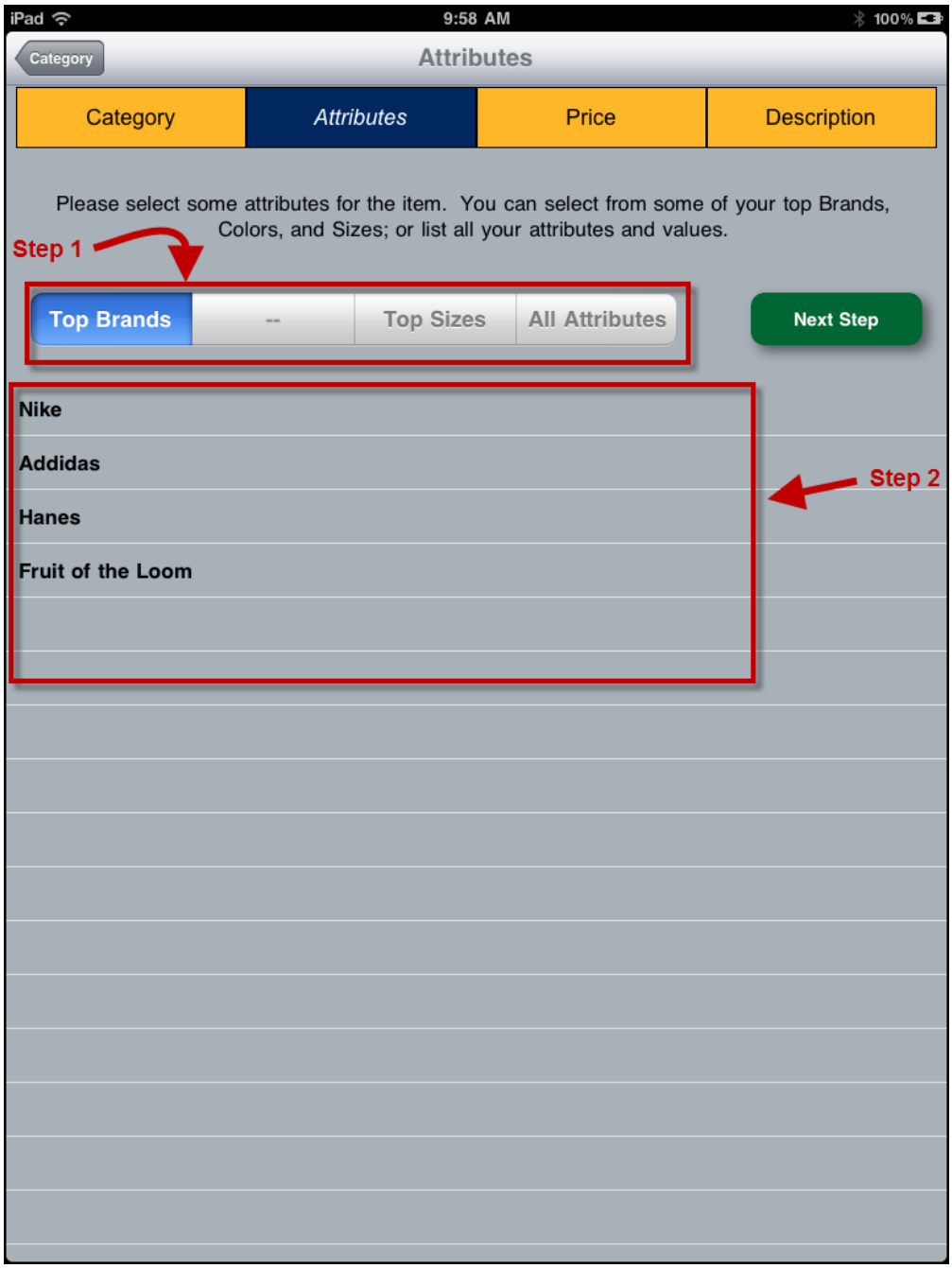
Select the attribute type to work on by taping on it.

Copyright 2010, Resaleworld.com, Inc.

Step 2:

Select the value you wish to add to the item for that attribute.

The application will automatically move on to the next attribute.



Listing All Attributes

Step 1:

Tap the **All Attributes** button in the top attributes list.

Step 2:

Tap the attribute you wish to add to the item.

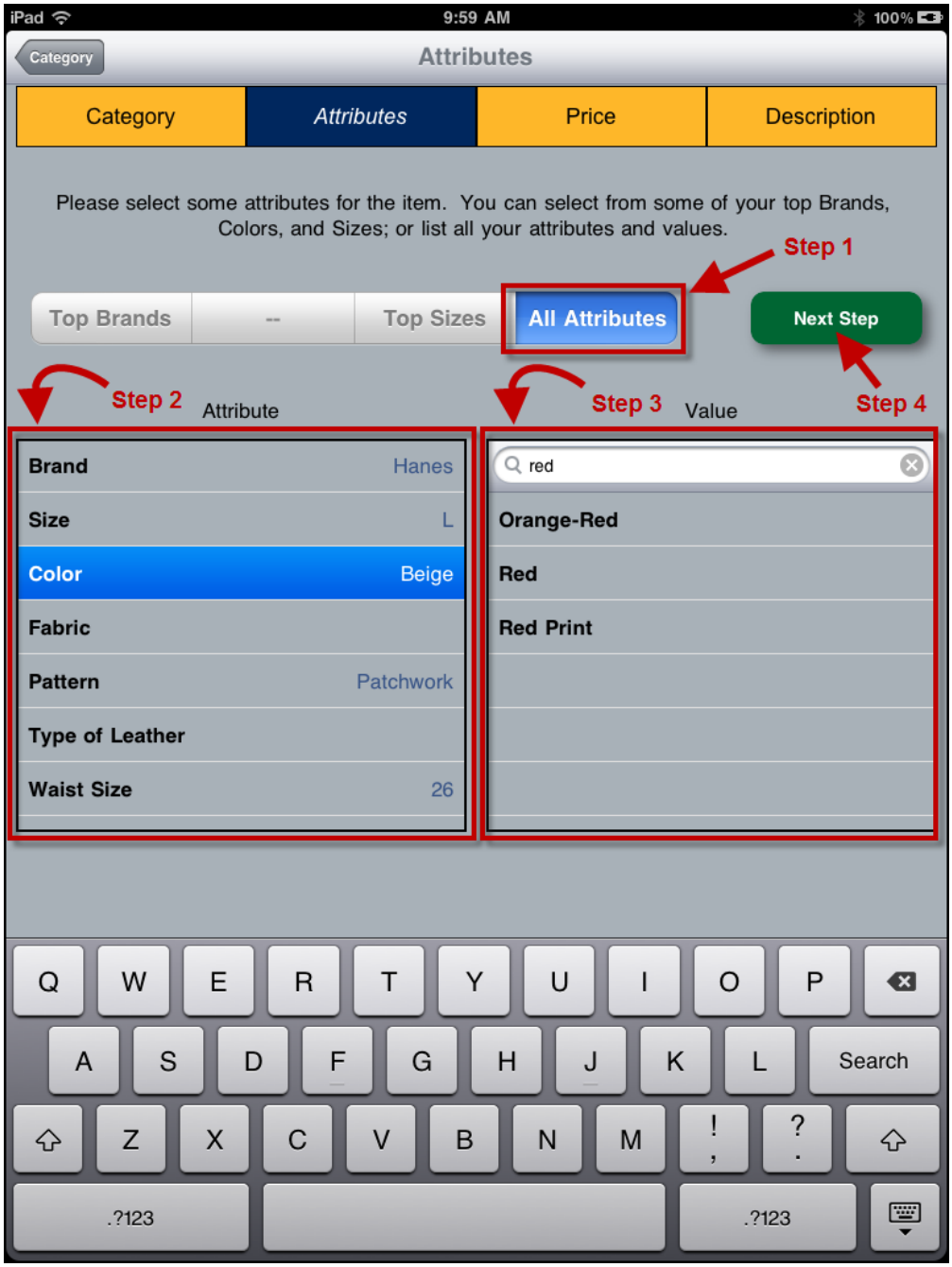
Step 3:

Tap the value you wish to add to the attribute.

Step 4:

Tap the **Next Step** button.

Copyright 2010, Resaleworld.com, Inc.



Add a Price to an Item

The next screen will depend on what is selected as the preferred form of acquisition for the account. These instructions will differ depending on whether the account has been set to "Consign" or "Purchase". It is not possible to change the form of acquisition within the iPad Item Entry application.

Step 1:

There are two ways to input a price for the item:

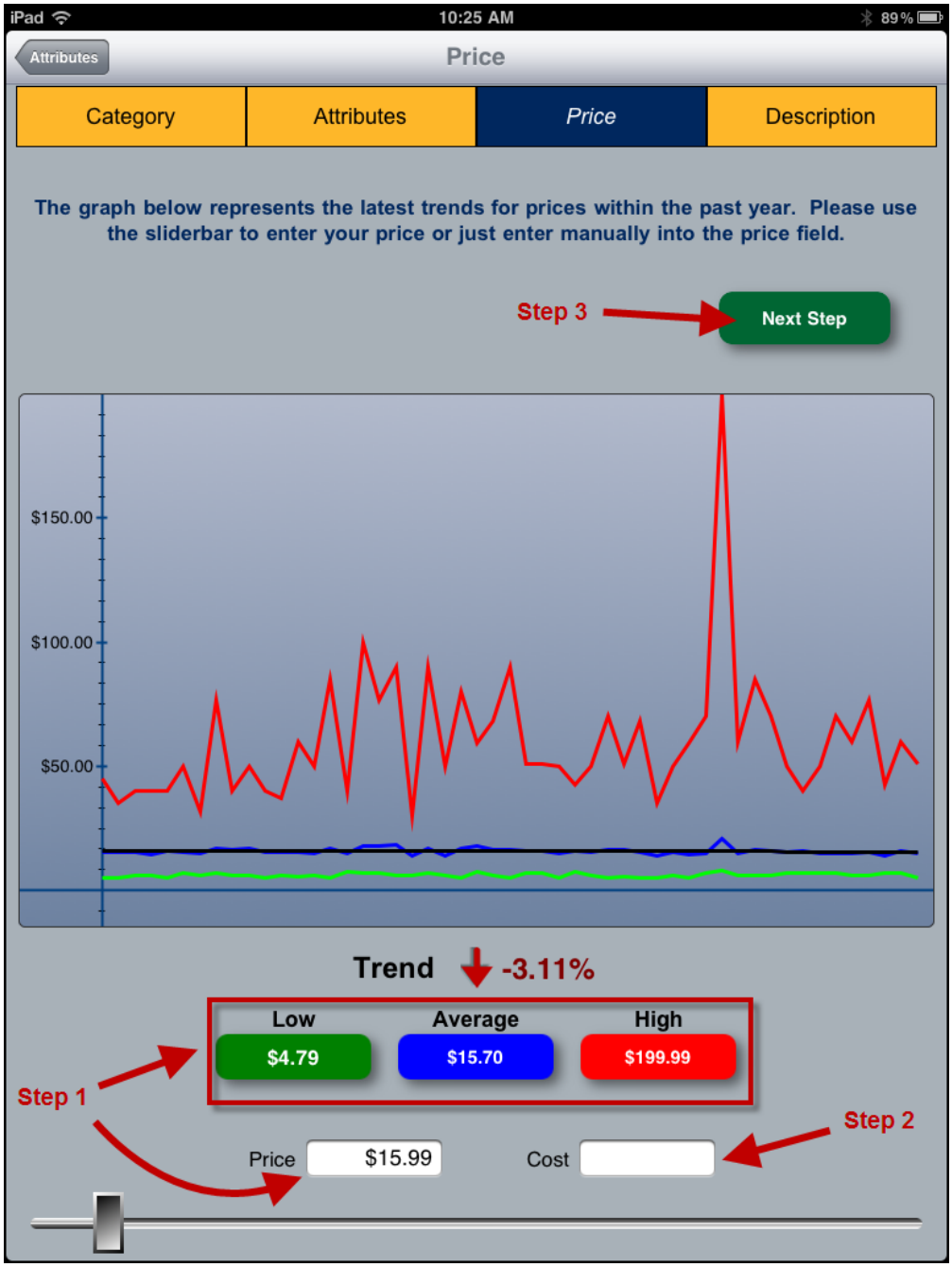
Select one of the prices indicated by the Trend for the item or input your price manually within the **Price** field.

Step 2:

If the form of acquisition is set to "Purchase", the application will allow you to input a cost for the item. If the application is set to "Consign", there will not be a **Cost** field and the preferred price code for the account will automatically be used.

Step 3:

Tap the **Next Step** button.



Input the Title, Description, and Images

Step 1:

Enter the Title of the item or use the pre-existing title.

Step 2:

Enter a Description of the item.

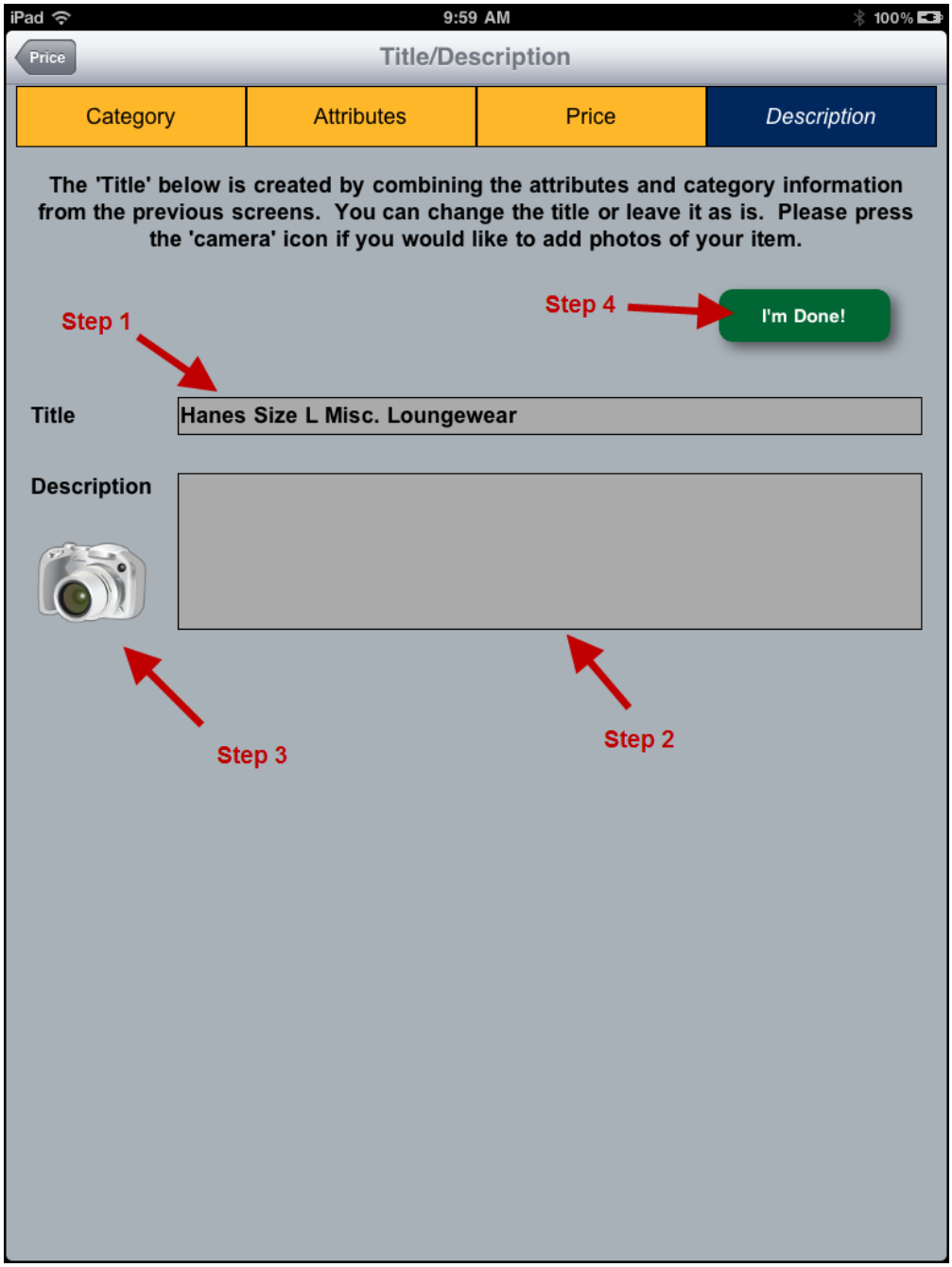
Step 3:

Tap the Camera icon to take a picture of the item and attach the image to the item.

Step 4:

Tap the **I'm Done!** button.

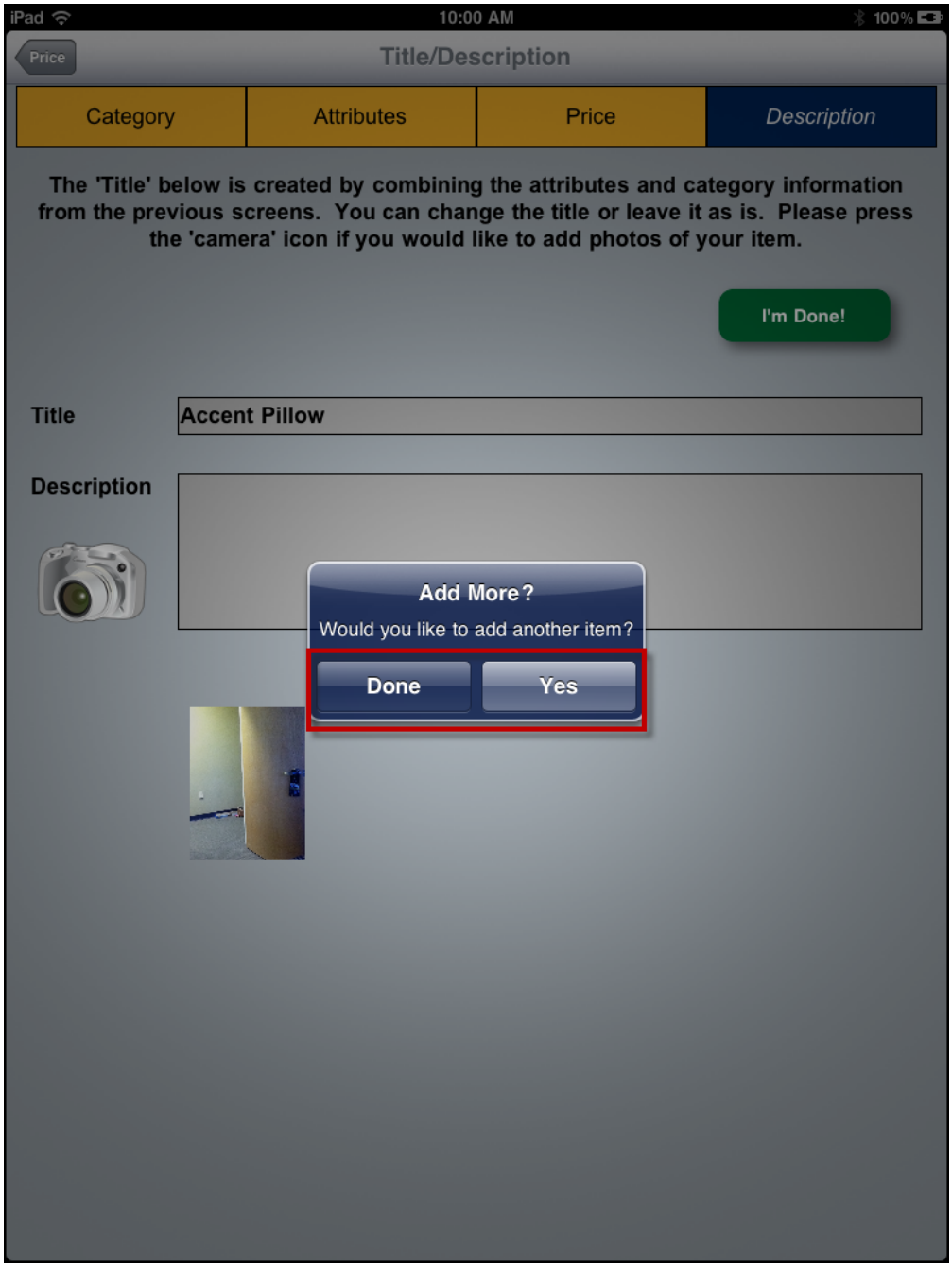
Copyright 2010, Resaleworld.com, Inc.



Continuing Item Entry

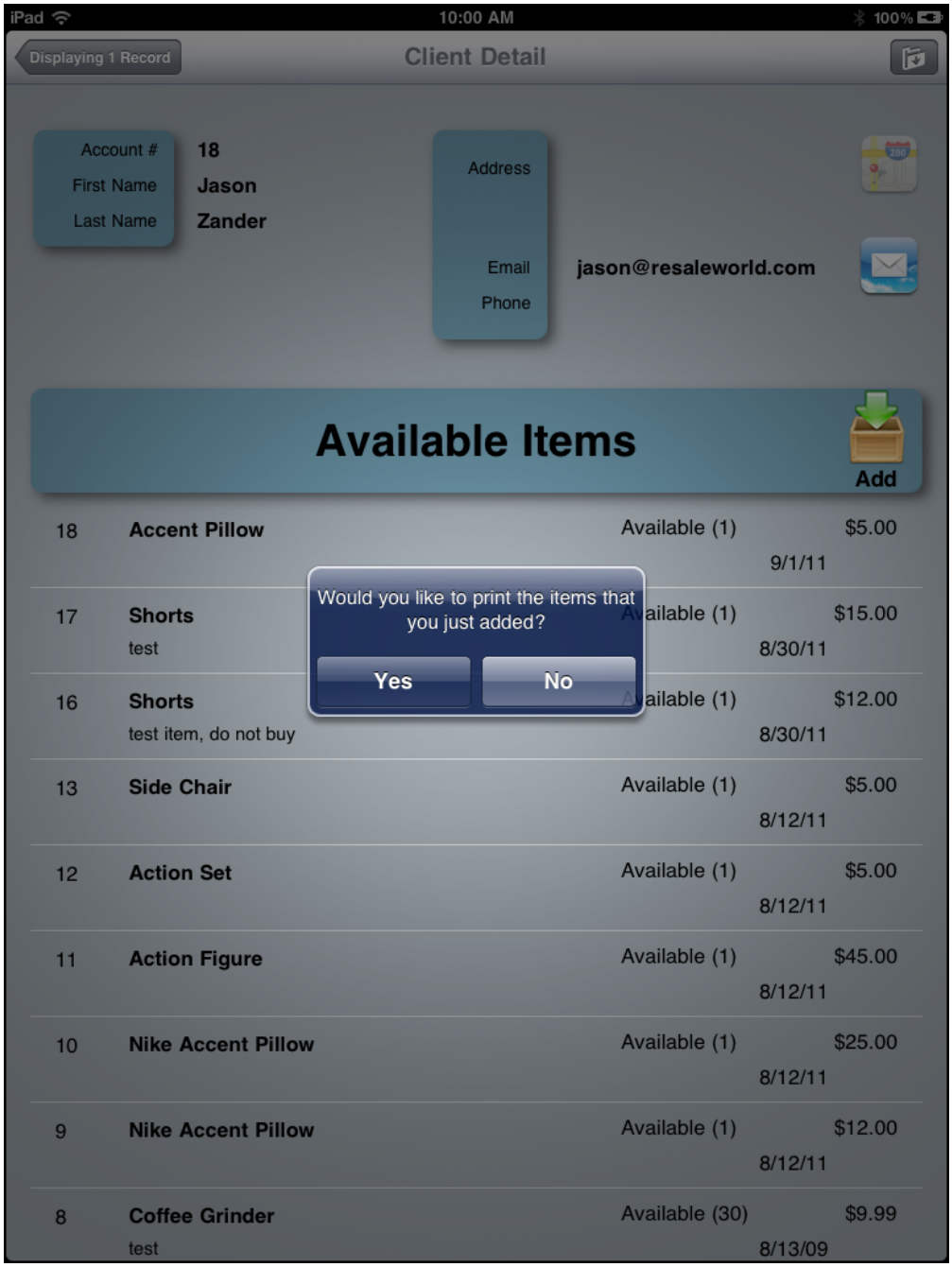
Select whether you would like to add another item by taping **Yes**.

Tap **Done** if this is the final item being added.



Printing Tags

The final prompt for item entry will ask if you would like to print tags for the items you just added.


iPad
10:00 AM
100%
Displaying 1 Record
Client Detail
Account #
First Name
Last Name
18
Jason
Zander
Address
Email
Phone
jason@resaleworld.com
Available Items
Add
18 Accent Pillow Available (1) $5.00 9/1/11
17 Shorts test Available (1) $15.00 8/30/11
16 Shorts test item, do not buy Available (1) $12.00 8/30/11
13 Side Chair Available (1) $5.00 8/12/11
12 Action Set Available (1) $5.00 8/12/11
11 Action Figure Available (1) $45.00 8/12/11
10 Nike Accent Pillow Available (1) $25.00 8/12/11
9 Nike Accent Pillow Available (1) $12.00 8/12/11
8 Coffee Grinder test Available (30) $9.99 8/13/09
Would you like to print the items that you just added?
Yes
No

PRINTING TAGS FROM AN EXISTING CLIENT ACCOUNT

Selecting an Account to Print Tags From

Step 1:

Select the type of sort criteria.

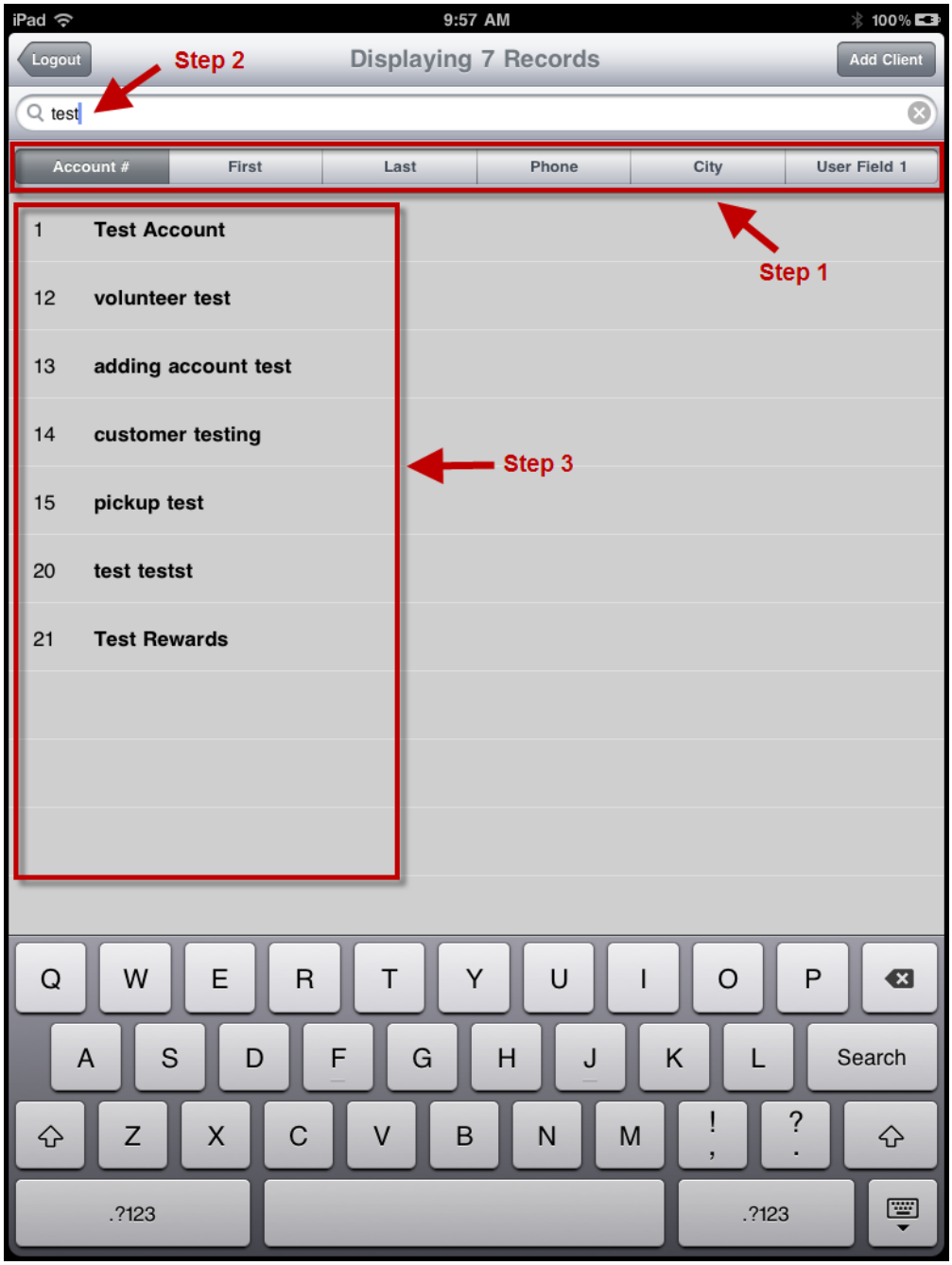
Step 2:

Enter account information within the search field relative to the selected criteria to search.

Step 3:

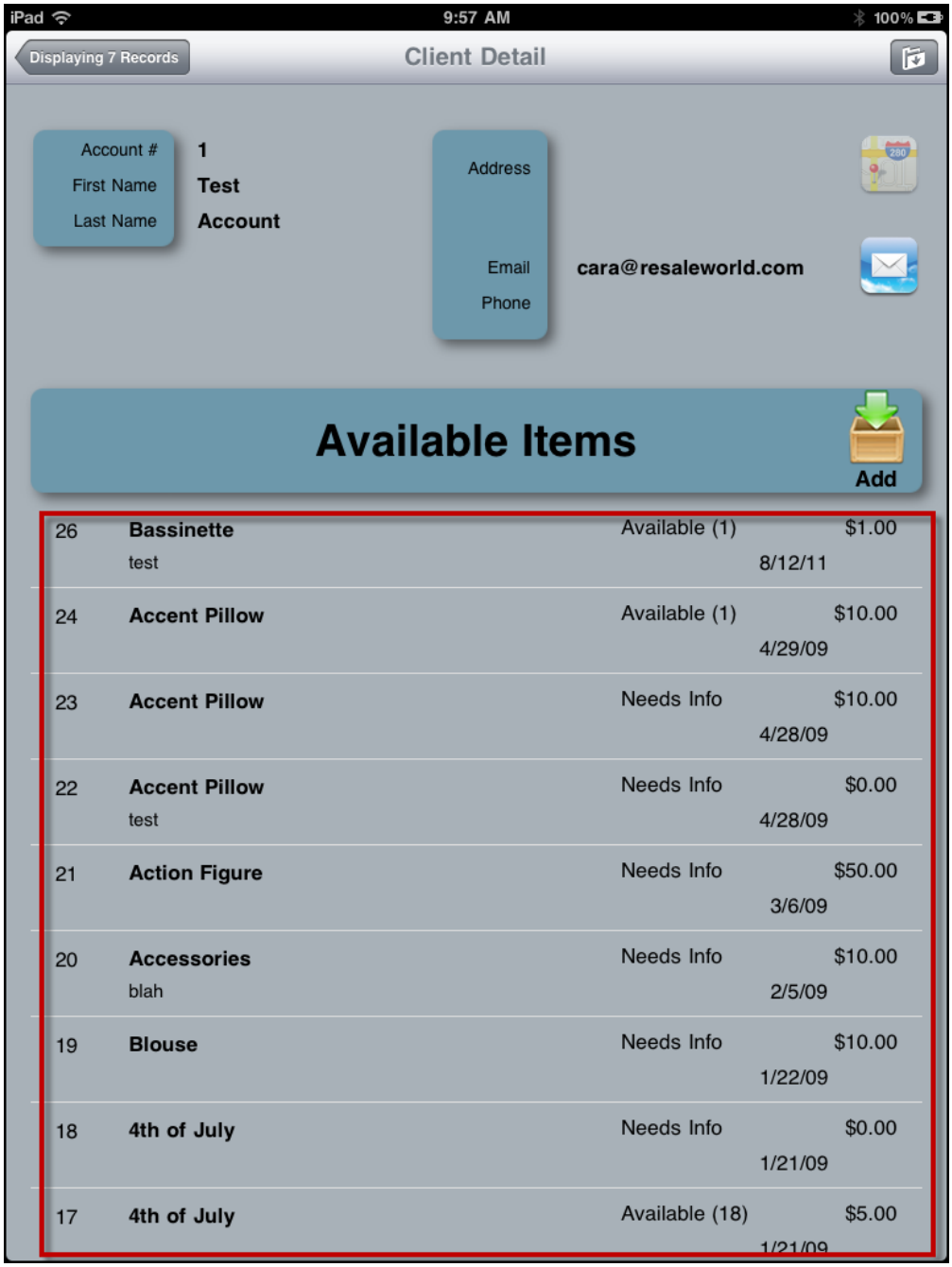
Tap the account to open it.

Copyright 2010, Resaleworld.com, Inc.



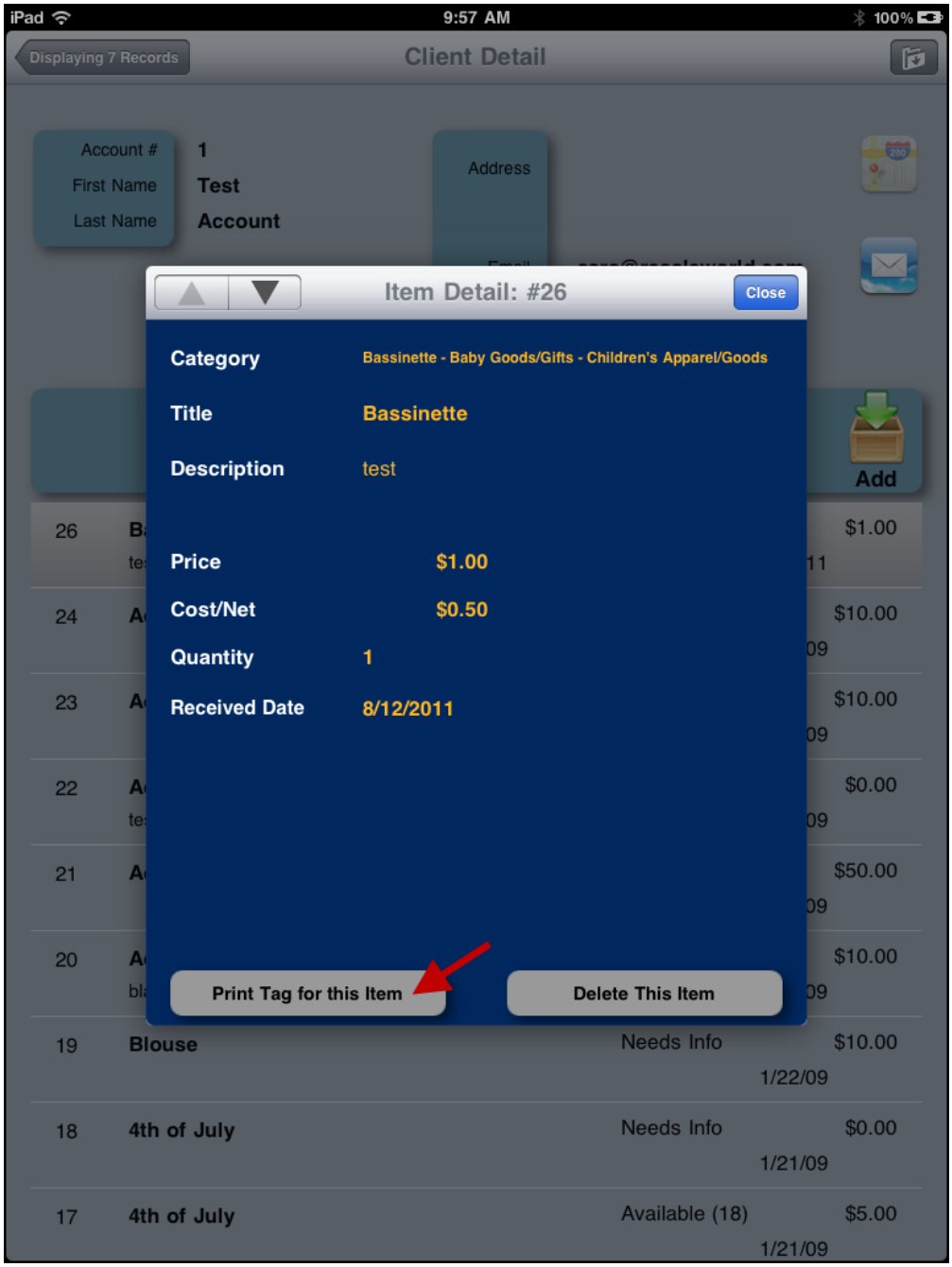
Select an Item

Tap the item you wish to print a tag for or tap any item if you wish to print multiple tags.



Printing Tags

Tap the **Print Tag For This Item** button.



Printing One or More Tags

Step 1:

Select the tag printer by tapping the **Tag Printer** field. There will be a selection of printers available on the server to choose from. Tap the printer to which you want to print.

Step 2:

Select the tag format for the tags being loaded in the printer by tapping the **Tag Format** field.

Copyright 2010, Resaleworld.com, Inc.

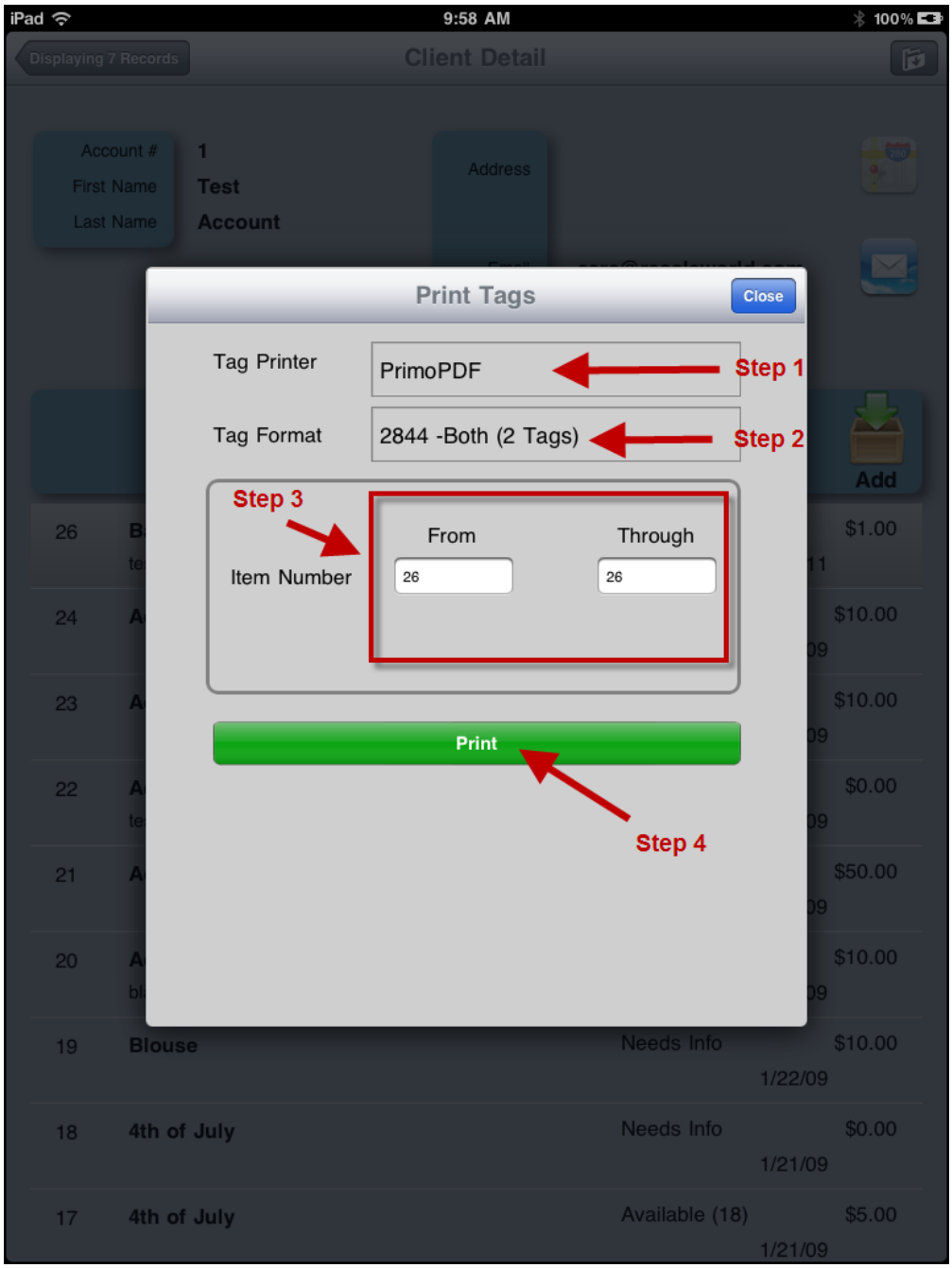
Step 3:

If the item selected is the one you wish to print out a tag for, leave this field as it is.

To print more than one tag, enter the starting item number in the **From** field and the ending item number in the **Through** field.

Step 4:

Tap the **Print** button to send the print job to the server. The tags will be printed at the store location.



DELETING AN ITEM FROM AN EXISTING ACCOUNT

Selecting the Client Account to Delete Items From

Step 1:

Select the type of sort criteria.

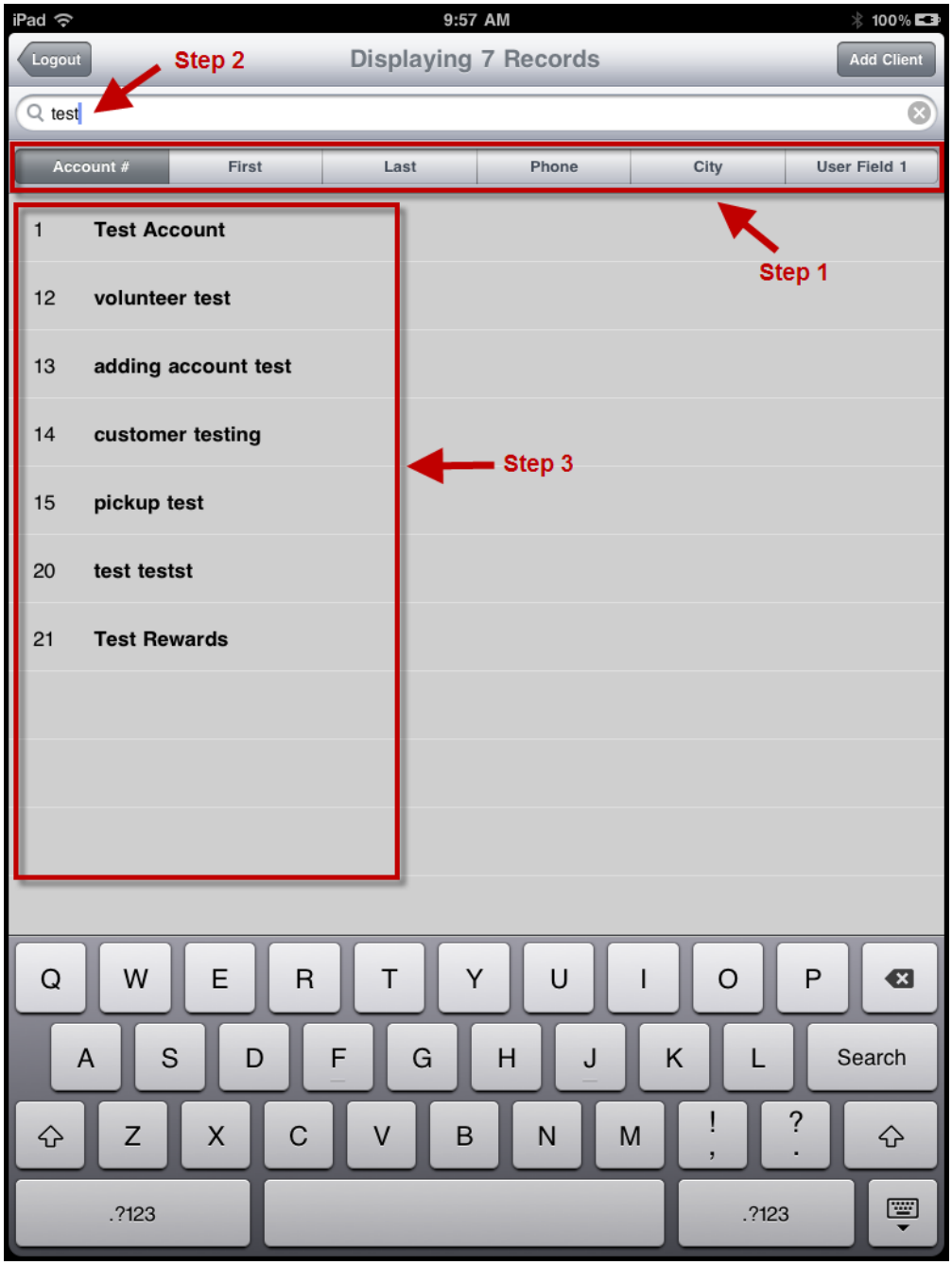
Step 2:

Enter account information within the search field relative to the selected criteria to search.

Step 3:

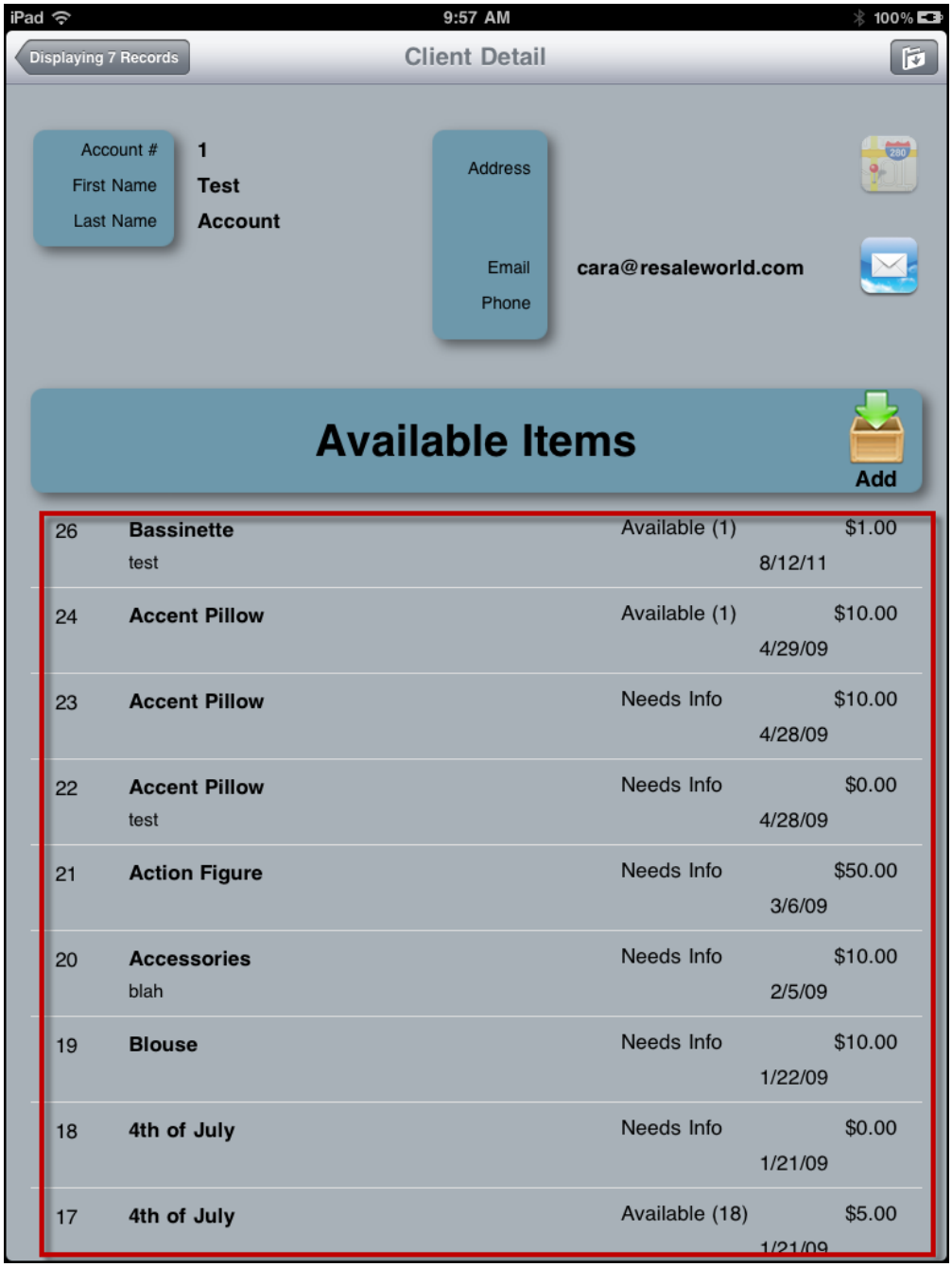
Tap the account to open it.

Copyright 2010, Resaleworld.com, Inc.



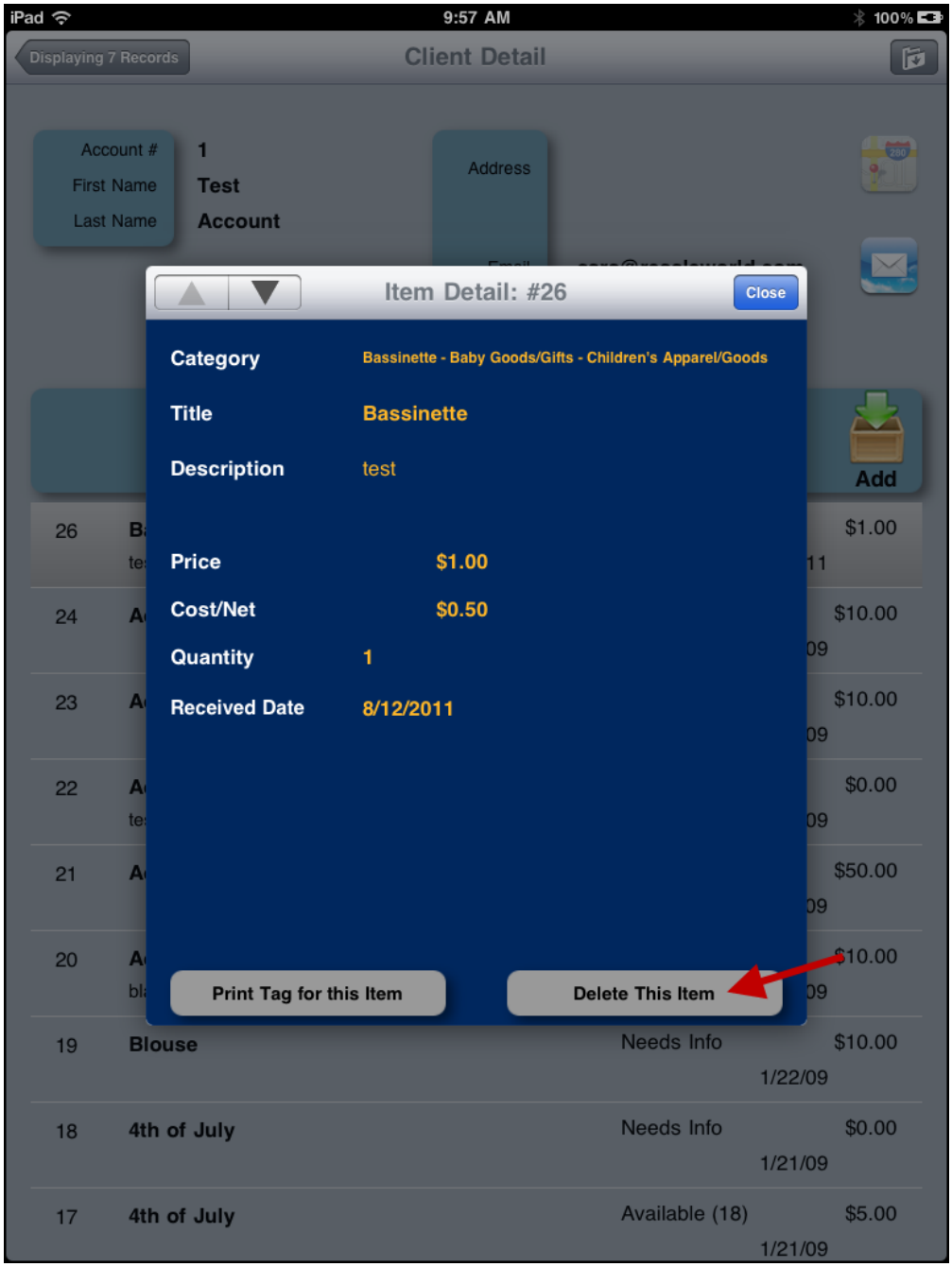
Selecting an Item

Tap the item you wish to print a tag for or tap any item if you wish to print multiple tags.



Deleting an Item

Tap the **Delete This Item** button.


iPad
9:57 AM
100%
Displaying 7 Records
Client Detail
Account #
First Name
Last Name
1
Test
Account
Address
Item Detail: #26
Close
Category
Bassinette - Baby Goods/Gifts - Children's Apparel/Goods
Title
Bassinette
Description
test
Price
$1.00
Cost/Net
$0.50
Quantity
1
Received Date
8/12/2011
Print Tag for this Item
Delete This Item
Add
26
24
23
22
21
20
19
Blouse
Needs Info
$10.00
1/22/09
18
4th of July
Needs Info
$0.00
1/21/09
17
4th of July
Available (18)
$5.00
1/21/09

Emailing an Item List For an Existing Client Account

Selecting an Account for Printing an Item List

Step 1:

Select the type of sort criteria.

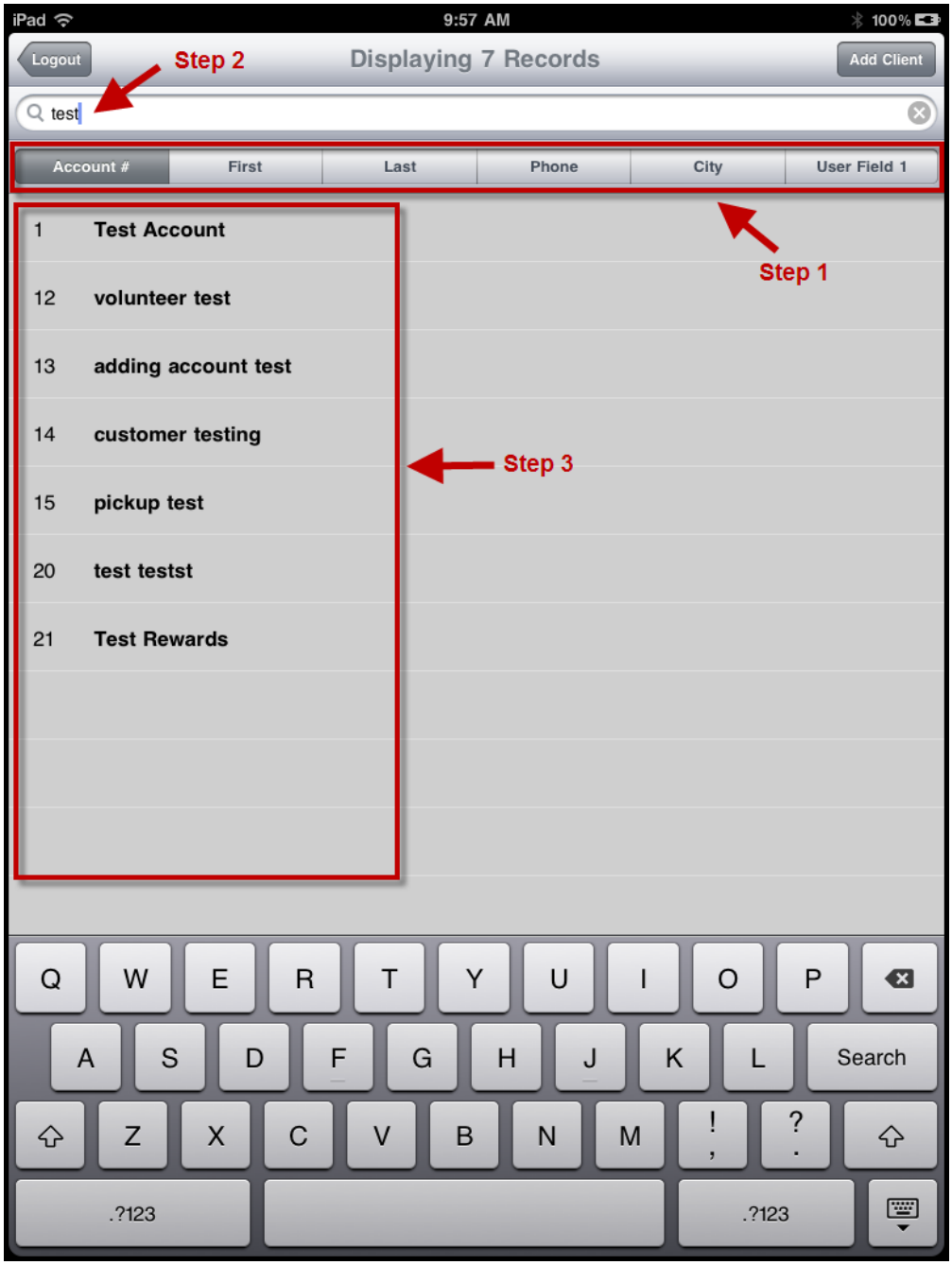
Step 2:

Enter account information within the search field relative to the selected criteria to search.

Step 3:

Tap the account to open it.

Copyright 2010, Resaleworld.com, Inc.



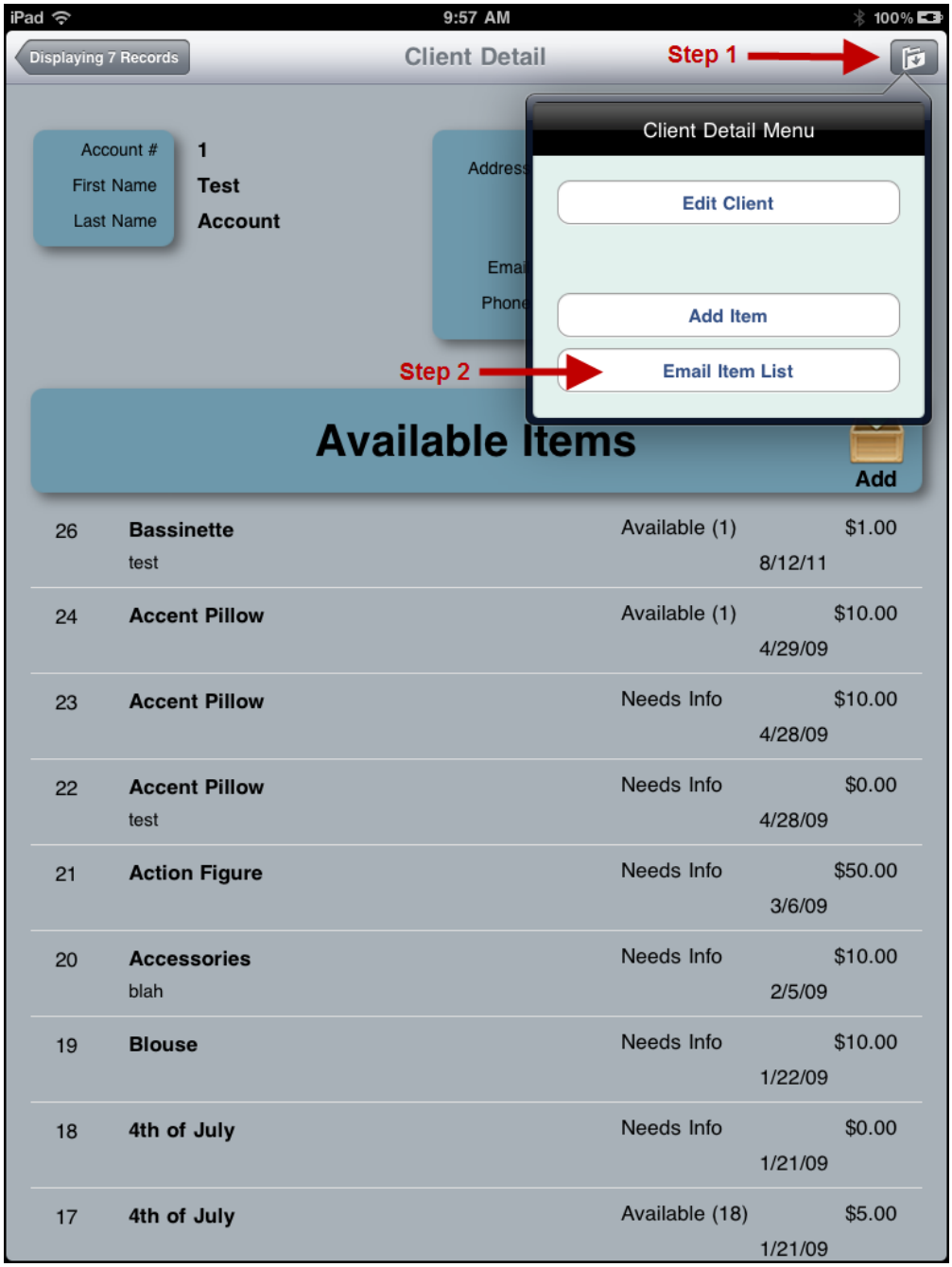
Select the Email Item List Button

Step 1:

Tap the Folder icon located at the top right section of the Liberty Item Entry application.

Step 2:

Tap the **Email Item List** button.



Emailing the Item List

Step 1:

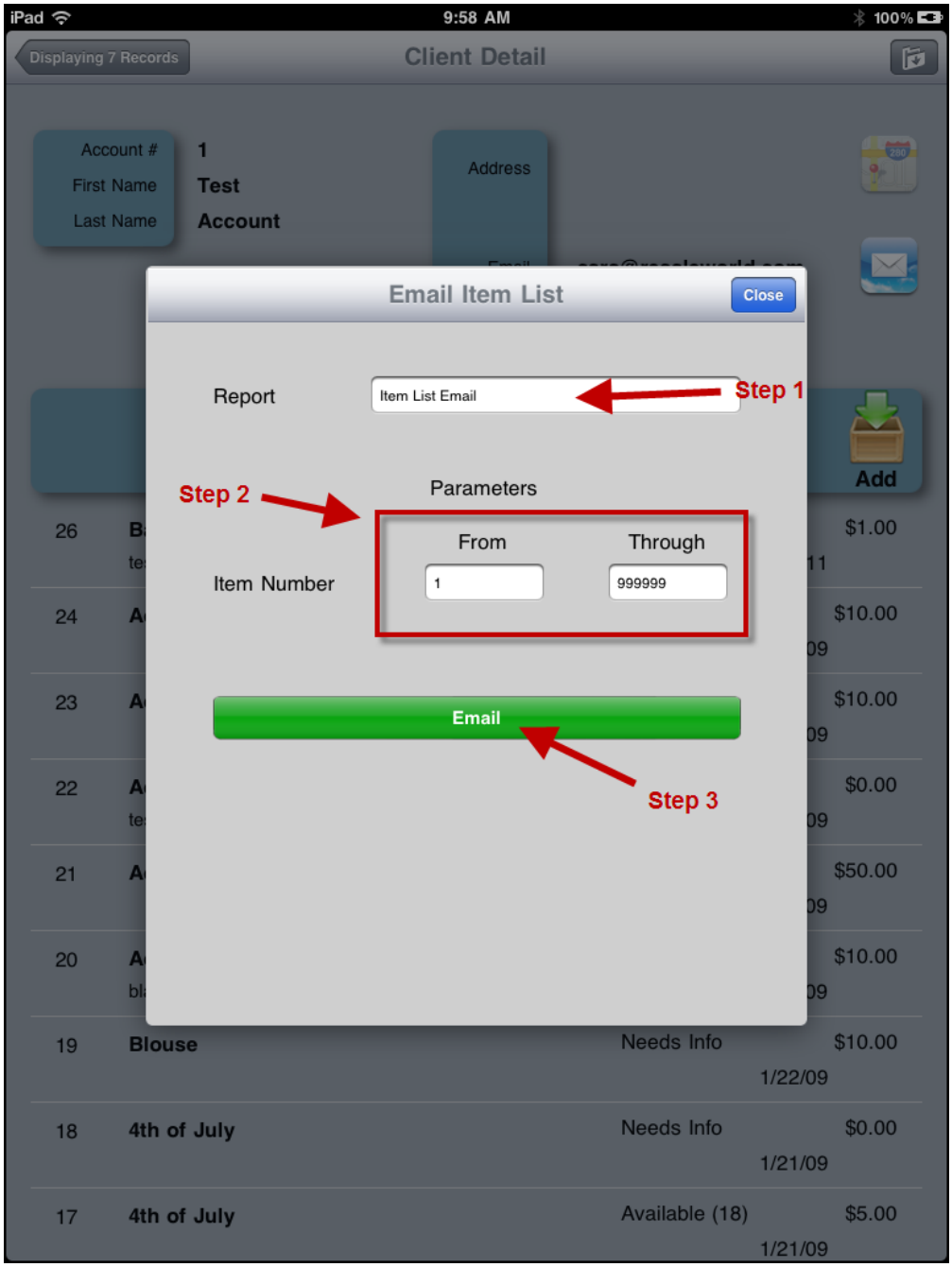
Select the "Item List Email" report by tapping the **Report** field.

Step 2:

Enter the starting item number in the **From** field and the ending item number in the **Through** field.

Step 3:

Tap the **Email** button.



CONNECTING YOUR IPAD AND LIBERTY ITEM ENTRY APP

Setup

Step 1:

On your iPad's home screen, tap the **Settings** icon.

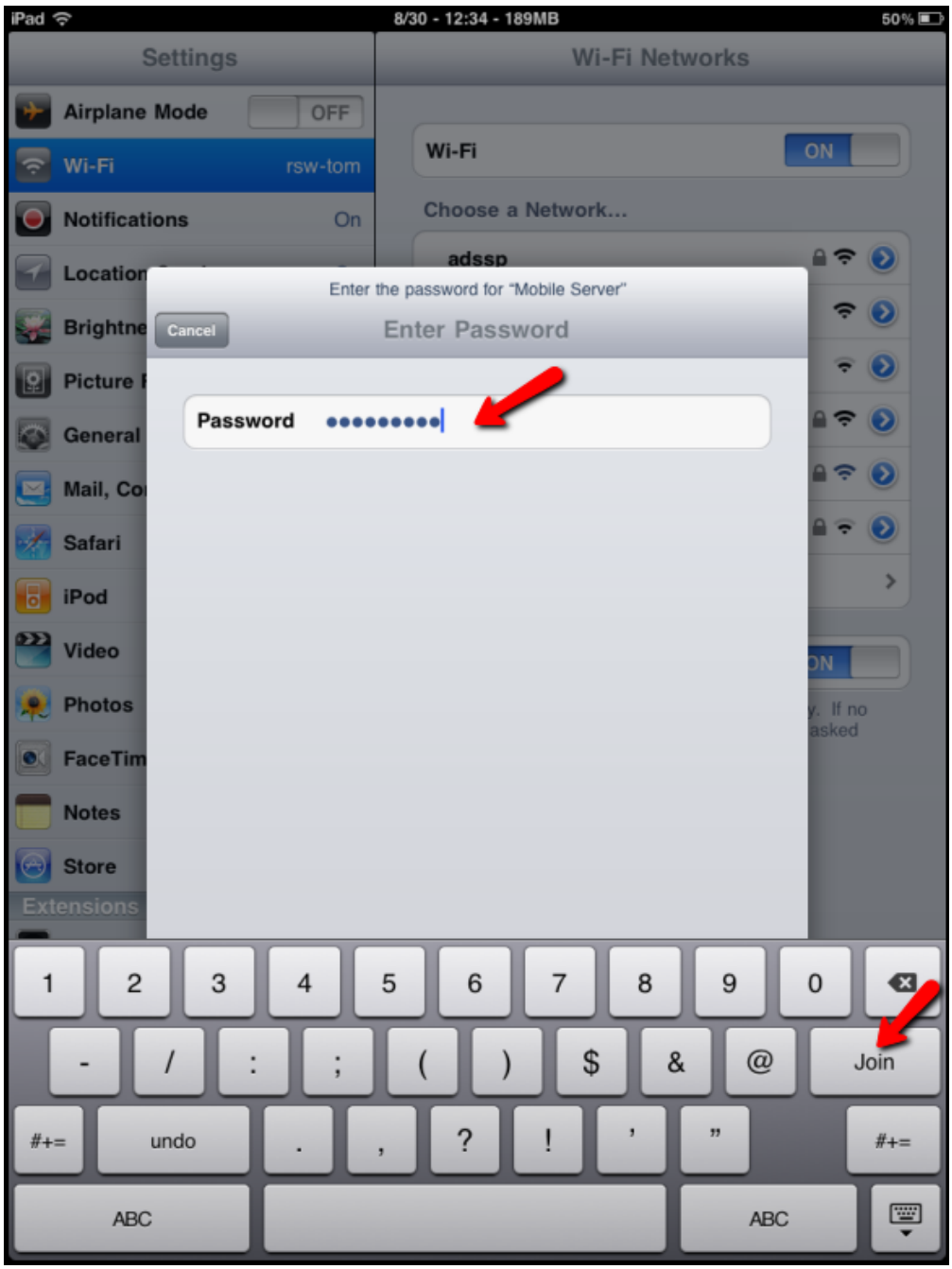
Step 2:

Under Settings, select “Wi-Fi” and then tap “Mobile Server” in the Wi-Fi Networks section.

Step 3:

In the **Password** field, enter "rsw" followed by the six digit RSWID number and then tap **Join** on the iPad's touch keyboard. **Example:** rsw123456

Copyright 2010, Resaleworld.com, Inc.

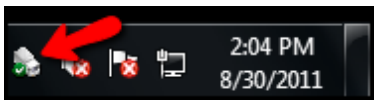


Step 4:

Make sure you have version Liberty 3.8c or above.

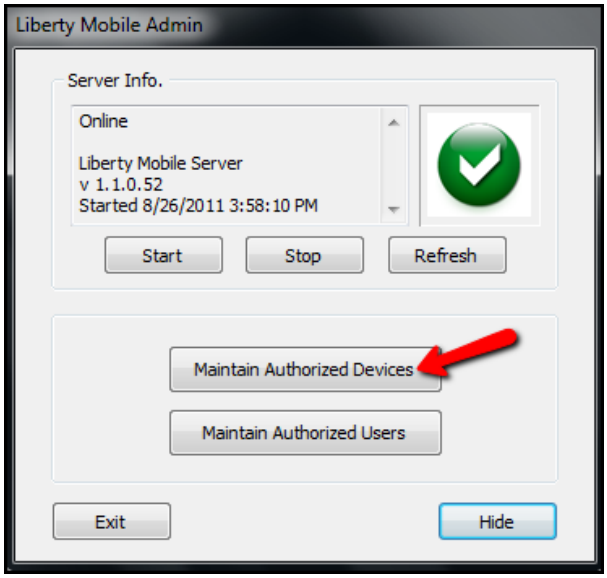
You will need to install Liberty Mobile Server located at *http://My.Resaleworld.com*.

The installer will put an icon for Liberty Mobile admin in your task bar (see below). Double-click to run.



Step 5:

Click the **Maintain Authorized Devices** button.



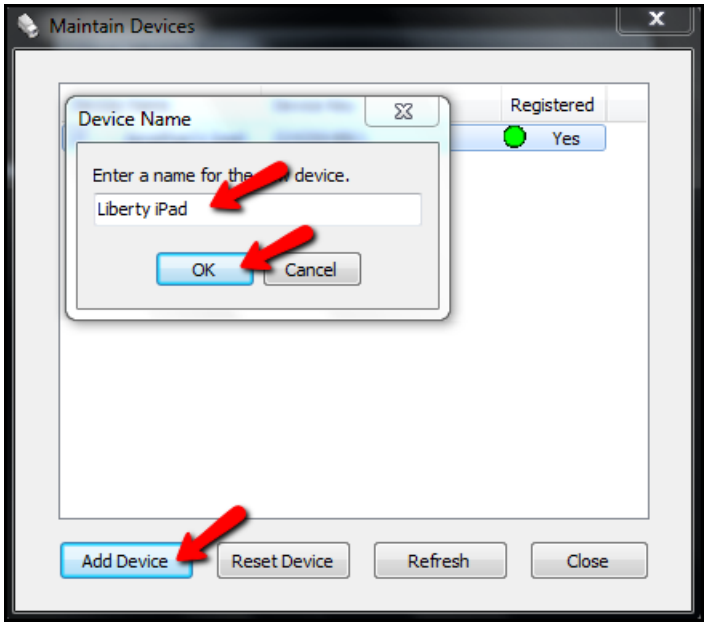
Step 6:

Sign in with an administrative level 10 account.

Step 7:

Click the **Add Device** button. In the **Device Name** window, enter a unique identity for the iPad you are adding and click **OK**.

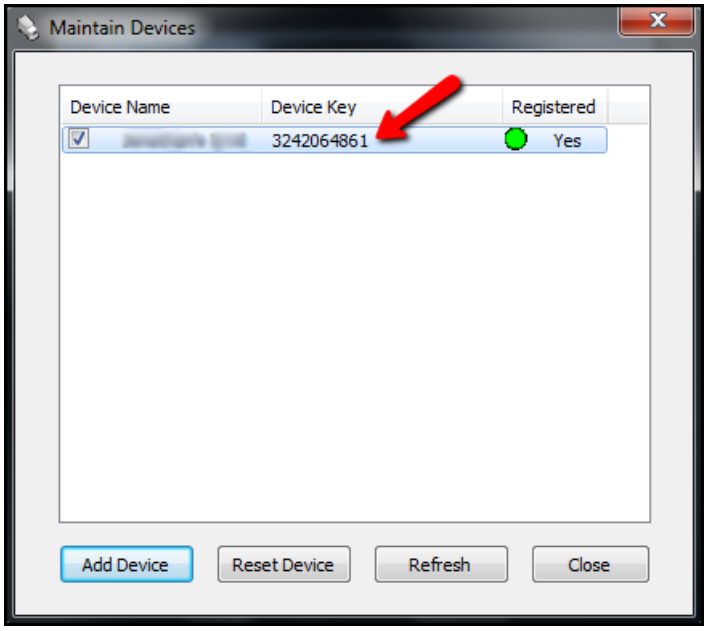
Copyright 2010, Resaleworld.com, Inc.



Step 8:

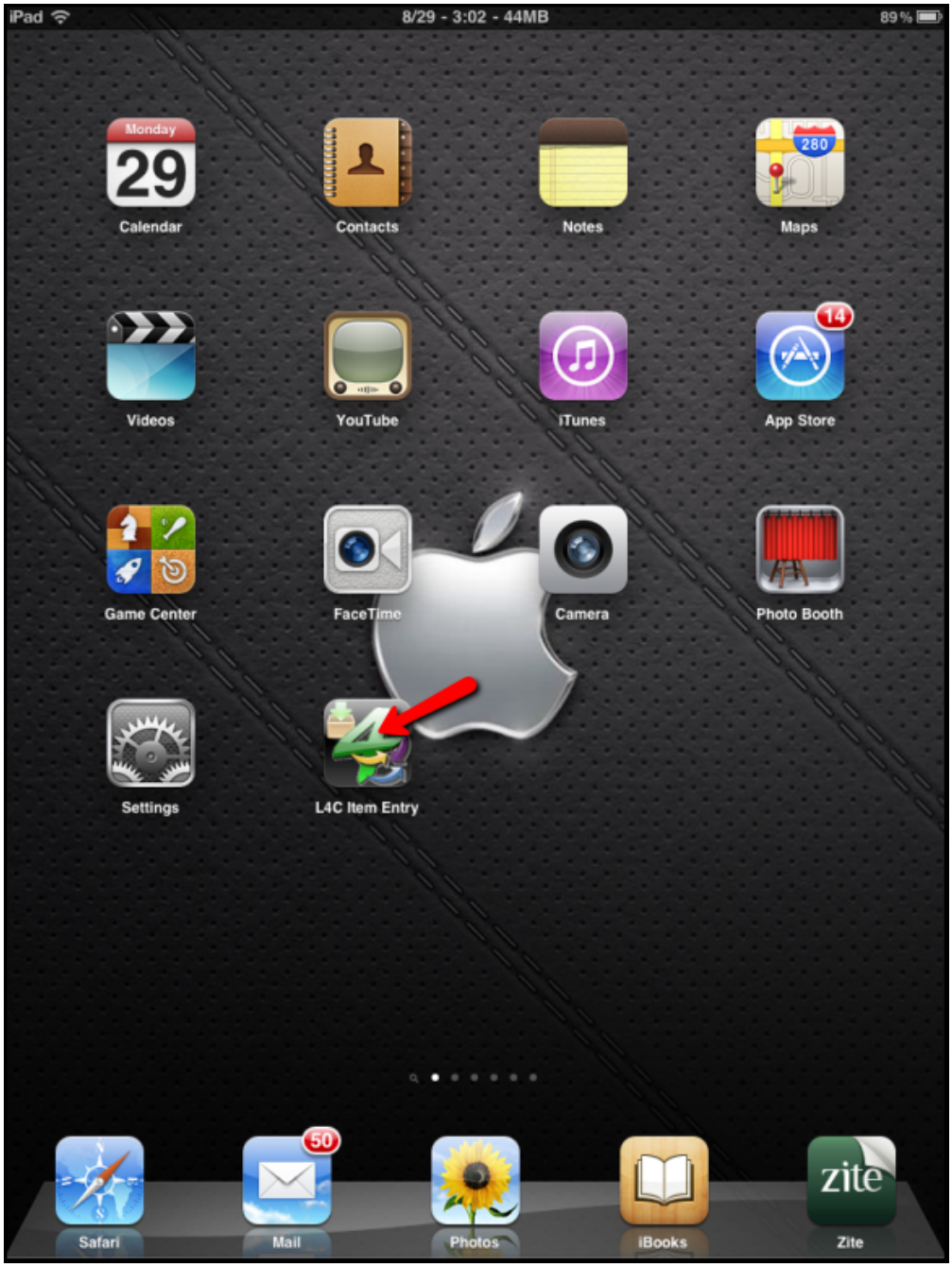
Make a note of your device key as you will need to input this in the L4C Item Entry application.

> ***NOTE:*** *Do not use the key in the image below as it is just an example.*



Step 9:

Go to you iPad's home screen, tap the **L4C Item Entry** icon.



Step 10:

Tap the "+" button if the screen below does not appear.

In the **Description** field, enter "Liberty Mobile Server".

For the **Key** field, enter the "Device Key" for the device you created in Step 8.

You will need to determine your network's external IP address and enter it into the **Server Address** field. Navigate to *http://whatismyip.com* to get this information.

Click the **Submit** button.

Step 11:

Sign in and you are ready to use the L4C Item Entry App.

Copyright 2010, Resaleworld.com, Inc.

Addendum

We recommend setting your computer to a static IP address below the router's IP pool so that the server's IP address always stays the same.

LAYAWAYS

PoS Module → Layaway Button

The **Layaway** routine provides a method to track items when a deposit is made to hold the items until full payment is made.

When paying consignors with items on layaway, Liberty provides two choices - to only pay when an item has been fully paid for, or to pay as soon as an item is put on layaway, potentially before being fully paid. See Set Payment Preferences for more details.

Note the Following About Layaways

- A deposit (or down payment) is optional.
- It is your option whether or not to pay clients with consigned items on layaway. To set this option, please see the paragraph **Include Layaway Items in Total Owed** in Set Up Payment Accounts.
- Receipts show Layaway information.
- Money due to consignors upon the completion of a layaway is available as store credit as soon as the item is put on layaway.
- **Example:** Amy Chase puts a $100.00 table on layaway. The table was consigned by Calvin Donald, and he is to receive 60% of the sale (in this case, $60.00). As soon as the first layaway payment is made, Calvin Donald's available store credit is increased by the entire amount of the sale of the table - in this case $60.00.

To Place Items On Layaway

1. Post the items for the sale using Easy, Change and/or Sale Post.
2. Press the <**F9**> key, or
   select the **F9 Account** button.
3. Select the client account from Customer Lookup dialog and click **OK**. If the customer does not have an account, create one by clicking on the **Add** button.
4. If a deposit is to be made, enter the amount of the layaway deposit, then choose the

Copyright 2010, Resaleworld.com, Inc.

method of payment (Cash, Check, etc.). If no deposit is to be made, skip to the next step.

5. Click on the **Layaway** button.
6. Press the **Y** key to print receipt.

To Lookup a Layaway Sale

1. On the PoS Main Menu, select **File** ➔ **Layaway Lookup.** The Lookup Layaway dialog will display.
2. **Search** for the Layaway and select **OK**.

To Accept Subsequent Layaway Payments

1. **Lookup** the Layaway (see Lookup a Layaway Sale, above).
2. Enter the amount received from the customer and select the payment method (cash, check, etc.).
3. Click on the **Layaway** button.
4. Enter **Y** to print receipt.

To Accept the Final Layaway Payment

1. **Lookup** the Layaway (see Lookup a Layaway Sale, above).
2. Enter the amount received from the customer and select the payment method (cash, check, etc.).
3. Press **F10** to complete sale.
4. Enter **Y** to print receipt Enter Y to print receipt.

Related Topics

Set Payment Defaults

Copyright 2010, Resaleworld.com, Inc.